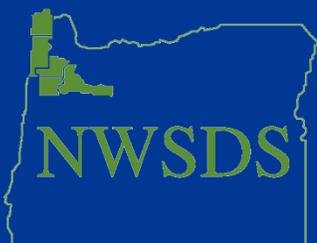
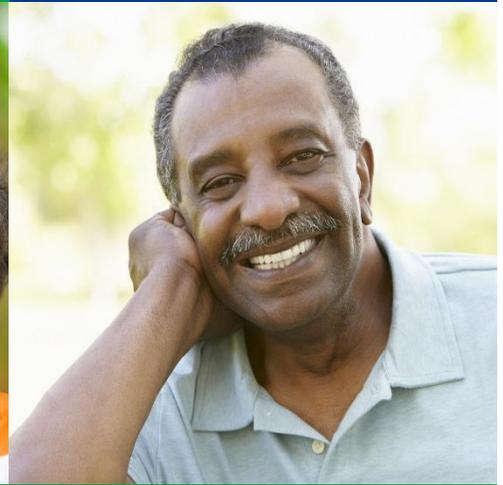


NORTHWEST SENIOR & DISABILITY SERVICES AREA PLAN

For the period of
January 1, 2017—December 31, 2020

DISTRICT #1

Serving Clatsop, Marion, Polk, Tillamook and Yamhill Counties
Northwest Senior & Disability Services
Agency Administrative Offices
3410 Cherry Avenue NE, Suite 220
P.O. Box 12189
Salem, OR 97309-0189



OUR MISSION

*Promote dignity, independence,
and health; honor choice
and empower people.*

**NORTHWEST SENIOR & DISABILITY SERVICES
AREA PLAN
2017-2020**

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A. Area Agency Planning and Priorities

A-1. Introduction and Overview

NorthWest Senior & Disability Services (NWSDS) is a local, inter-governmental organization established by Charter and Agreement by Clatsop, Marion, Polk, Tillamook and Yamhill counties pursuant to ORS Chapter 190. The Agency was created for a single purpose: to provide services to seniors & people with disabilities. NWSDS is governed by a five-member Board of Directors. The Board of Directors is comprised of one elected county commissioner from each county in the service area (Clatsop, Marion, Polk, Tillamook, and Yamhill).

NWSDS is designated by the State of Oregon as the Area Agency on Aging (AAA) and the Aging and Disability Resource Connection (ADRC) for its 5-county service area. The Board of Directors is assisted by two Advisory Councils, the Senior Advisory Council (SAC) and the Disability Services Advisory Council (DSAC). The function of the Advisory Councils is to advise the Board and Executive staff on the needs of consumers served by the NWSDS, the general well-being of older adults and persons with disabilities in its service area, and on important matters affecting the operations of the agency.

The Area Plan serves as an agreement between the State of Oregon and NorthWest Senior and Disability Services to provided needed services and supports to older adults and adults with physical disabilities living in the NWSDS 5-county service area. The Area Plan serves as a roadmap for program services for the next four years. The Plan does not encompass all of the activities of NWSDS; it is designed to include a vision for the future and articulate priorities and strategies that will position its program services to meet the changing demographics and needs of the communities NWSDS serves.

A-2 Mission, Vision, Values

The mission of the NorthWest Senior and Disability Services is to ***promote dignity, independence and health; honor choice and empower people.*** In pursuing this mission, the NWSDS is committed to the core values of integrity, professionalism, service and compassion. Integrity means working honestly, ethically, and being accountable; Professionalism means representing the Agency with pride, expertise, and excellence; Service means responding promptly to customer and community needs; and Compassion means showing concern and respect for the well-being of others. Through our diligence in pursuing our mission by conducting our work and delivering services in a manner consistent with our values, we will achieve our vision to be an innovative, nationally recognized leader serving seniors and people with disabilities.

A-3 Planning and Review Process

An Area Plan Steering Committee was appointed to oversee the Area Plan development process and was assigned the following responsibilities:

- Approve the planning process, including timeline and data sources;
- Select and oversee any consultants;
- Recommend adjustments in the planning process, if needed;
- Oversee the drafting and revisions to the plan;
- Conduct Public Hearings;
- Recommend final plan to Advisory Council/Board of Directors;
- Recommend how the plan will be monitored.

The Steering Committee was composed of 4 individuals who serve on the NWSDS Senior Advisory Council and Disability Advisory Council and 2 Executive Management staff.

The Steering Committee adopted a planning guide for use by staff to address the required focus areas of Information and Assistance Services

and Aging and Disability Resource Connection (ADRC); Nutrition Services; Health Promotion; Family Caregivers; Elder Rights and Legal Assistance; Older Native Americans. The following were the major components of the guidance:

- Identify a staff lead for each focus area
- Identify a committee (5) of program experts (2), advisory council (1) and community partners (2); 1 in-person meeting (4-6 hours) + follow-up via email for draft review/feedback
- Pre-meeting preparation
 - Program background information to have a good discussion about the program's current situation:
 - history,
 - lessons resulting in past success,
 - trends that need to be paid attention to plan for future,
 - recent progress (last 18-24 months)
 - Send background information one week in advance of the meeting
- Meeting Agenda
 - History and Present Situation
 - Program Goals and Desired Outcomes
 - Group Discussion:
 - Alignment of recent progress with program goals/desired outcomes. *On a scale of one to ten, with 10 being fantastic progress toward accomplishing program goals and desired outcomes and 1 moving backward, how would rate the program's progress over the last two years?*
 - Identify significant challenges for the program
 - Identify critical issues for the future
 - Come to agreement on 4-6 critical issues that need to be answered

- Sequence the issues with the most fundamental and basic first
- Address each issue, list possible ways to resolve the issue and select the best solution (s)
- Next Steps
 - Draft a work plan for each critical issues that identifies S.M.A.R.T objectives for each issue
 - Identify resources that are needed to implement the work plan (budget, staff etc.)
 - Draft a monitoring plan

The Focus Area Workgroups considered the findings from program monitoring reports and consumer satisfaction surveys completed by the Agency over the last three years; the analysis of 3 consumer focus groups conducted with Spanish-speaking older adults and one focus group conducted with Russian-speaking elders during the Spring of 2016; program utilization data and trends; literature reviews; and demographic data provided through a mapping project contracted with Portland State University, Institute of Portland Metropolitan Studies/Population Research Center.

The Steering Committee met every other month with staff leads to review progress. The draft plan was made available for public input from September 1, 2016 until the September 15, 2016 when a final public hearing was held by the joint Senior and Disability Advisory Councils of NWSDS. The plan was adopted by the NWSDS Board of Directors on September 22, 2016.

A-4 Prioritization of Discretionary Funding

Once NWSDS has met its minimum service requirements, and continuing contractual obligations, we have the discretion to allocate any remaining funds (that may be available) to further enhance existing services, or initiate new programs. How these discretionary funds are expended is based on a

prioritized list of services recommended by the advisory councils, and adopted by the board of directors.

The prioritized list of services recommended by the advisory councils is developed in conformance to a set of guiding principles, also approved by the councils:

- OAA/OPI services/programs funded by NWSDS should meet the overall goals of the Agency mission statement and strategic plan, as these are the documents which establish priorities, goals and objectives.
- OAA/OPI services/programs funded by NWSDS should be prioritized according to the basic necessities of life (e.g., food, shelter, etc.).
- OAA/OPI services/programs for which funding is sought must have an identifiable outcome and meet an identifiable need that cannot otherwise be adequately met by other community resources.
- The funding of an identified need, service or program should not be precluded because it is not five-county wide.
- Costs for OAA/OPI services/programs should be in line with average costs of areas with similar demographics. Reasonable costs should meet the “prudent person” test.
- An auxiliary service should not exceed the cost per unit of the primary service (e.g., meal site transportation unit cost compared to meal unit cost).
- Input and involvement from potential OAA/OPI service/program participants should be a part of the planning process and, when feasible, part of the recommendation process. Involvement of participants/consumers in the evaluation and monitoring of programs and services is essential.
- Dependable, high quality, cost effective service to consumers and the public is an important desired outcome for all OAA/OPI services/programs. NWSDS should not only do the right thing, but also do things right.
- Whenever feasible and allowable, discretionary funds used to develop “new” OAA/OPI services/programs should be used as seed money and will be time limited.

- Emphasis should be placed on building and/or replicating partnerships which control costs, yet maintain the quality necessary to serve people well.
- NWSDS Senior Advisory Council members, in cooperation with the NWSDS Disability Services Advisory Council (DSAC) members, shall educate the public about NWSDS services and programs. When applicable, such education will include information regarding funding cuts or proposed cuts that affect the seniors and people with disabilities we serve in our five-county service area.

The Advisory Councils' prioritized list of services, recommended to, and adopted by, the Board, for the utilization of OAA/OPI discretionary funds is as follows:

- 1. Transition Support**
- 2. Personal Care**
- 3. Home Care**

Implementing the prioritized list of services will adhere to the following guidelines, as well:

- 1.** In an environment of shrinking resources, discretionary funds should not be used to create new programs/services, and/or to expand existing programs/services, except as it may create an efficiency or an economy that preserves consumer service or fulfill a higher priority need.
- 2.** Any available discretionary funding should first be used to maintain and/or backfill NWSDS highest priority services or programs. Funding decisions would then be made on a case-by-case basis.

NWSDS' Oregon Project Independence (OPI) program is currently open to new intakes for individuals age 60 or older. Prior to taking new calls for intakes, the Agency went through its waitlist of more than 300 individuals. A validated risk assessment tool was administered to all individuals who requested to be placed on to the waitlist. The tool provided a score

indicating each individual's level of risk. Once all individuals on the wait list were contacted by risk level (high to low) to see if they were still in need of the OPI program, NWSDS openly shared the program was open to new intakes.

B. Planning and Service Area Profile

B-1 Population and Service Area Profile

NWSDS has six office locations to serve the communities in its five-county planning and service area. The service delivery area for each office is assigned by zip codes. NWSDS contracted with the Portland State University (PSU) to compile demographic data by zip code so that it could profile the communities it serves based on its service delivery model. PSU created maps and tables by zip code using data from the American Community Survey 2010-2014. The following variables were mapped (by zip code) for Clatsop, Marion, Polk, Tillamook and Yamhill counties:

- Population age 65 and over
- Population age 75 and over
- Population age 85 and over
- Population in poverty, age 65 and over
- Black/African American population, age 65 and over
- Native American/Alaska Native population, age 65 and over
- Asian population, age 65 and over
- Hispanic population, age 65 and over
- Limited English population, age 65 and over
- Population with disabilities, age 18 and over

Even though the estimates are made up of five years of survey data, the sample sizes were often too small to create reliable data. As a result, the Census Bureau publishes margins of error for each datum. The margins of error become significant in rural areas where populations are low to begin with and for subsets of the total population such as older adults and persons with disabilities. Because of this, PSU included "reliability" ratings for the data; coding it as reliable, use with caution and unreliable.

According to demographic data provided by the State of Oregon's Department of Human Services (DHS) and Portland State University the planning and service area of NWSDS has 112,746 total persons aged 60 and over; 9,028 of these individuals live in poverty. Of the people over 60 years of age living in poverty, 1,365 are minority persons. The data deemed reliable for older adults living in poverty revealed concentrations of these individuals in the communities of Dallas in Polk County; McMinnville, Amity, Newberg and Sheridan in Yamhill County; Salem, Silverton, Mt. Angel, Hubbard, Woodburn and Sublimity in Marion County, Tillamook in Tillamook County; and Astoria and Seaside in Clatsop County. The planning and service area has poverty "hotspots" of individuals in all age groups, in areas of Salem, Woodburn and Gervais in Marion County; West Salem and Independence in Polk County; the southern parts of McMinnville and Newberg in Yamhill County; East Astoria in Clatsop County; and North and West Tillamook in Tillamook County.

Of the 112,746 total people aged 60 and over, 9,249 identify as a minority person. Of the 9,249 older adults who identify as a minority person, 52% identify as Hispanic; 16% as Asian; 7% as Native American; 5% as African American; 2% as Native Hawaiian/Pacific Islander; 18% two or more races. The data deemed reliable for older adults identifying as Hispanic origin revealed concentrations of these individuals in the communities of West Salem in Polk County; Dayton in Yamhill County; and Salem and Woodburn in Marion County. We found concentrations of older adults with limited English proficiency living in Dayton located in Yamhill County and in the communities of Salem, Woodburn and Gervais in Marion County.

A review of unique individuals by primary race served by NWSDS who were enrolled in an Aging and People with Disabilities Case Managed Service in fiscal year 2015 revealed that 88% were Caucasian compared to 85% statewide; 6% were Hispanic compared to 3.7% statewide; 1% were Asian compared to 3.7% statewide; .7% were African American compared to 3.4% statewide.

Adults age 18 and older who reported as having a disability number 127,742. The planning and service area is rural, with the exception of Salem, located in Marion County.

NWSDS operates six service offices:

- **Dallas:** 260 NE Kings Valley Highway, Dallas, OR 97338. Phone: 503-831-0581. Zip codes served: 97306, 97338, 97361, 97344, 97304, 97351, 97371.
- **McMinnville:** 300 SW Hill Road, McMinnville, OR 97128. Phone: 503-472-9441. Zip codes served: 97378, 97128, 97148, 97127, 97396, 97111, 97347, 97115, 97101, 97132, 97114.
- **Salem:** 3410 Cherry Avenue NE, Salem, OR 97303. Phone: 503-304-3400. Zip codes served: 97342, 97325, 97392, 97384, 7383, 97358, 97350, 97346, 97317, 97305, 97302, 97301, 97303, 97352, 97360.
- **Tillamook:** 5010 E Third Street, Tillamook, OR 97141. Phone: 503-842-2770. Zip Codes served: 97131, 97108, 97112, 97147, 97134, 97118, 97141, 97107, 97122, 97149, 97135, 97136, 97130.
- **Warrenton:** 2002 SE Chokeberry Avenue, Warrenton, OR 97146. Phone: 503-861-4200. Zip Codes served: 97103, 97138, 97102, 97110, 97145, 97121, 97146.
- **Woodburn:** 2100 Progress Way, Woodburn, OR 97071. Phone: 503-981-5138. Zip Codes served: 97381, 97385, 97002, 97020, 97026, 97032, 97071, 97362, 97375, 97137.

Characteristic	Dallas Office	McMinnville Office	Salem Office	Tillamook Office	Warrenton Office	Woodburn Office
65 and over	15,608	15,017	30,391	5,522	6,564	10,590
75 and over	7,015	6,941	13,119	2,327	2,701	5,097
85 and over	2,270	2,260	4,361	571	919	1,566
Poverty, 65 and over	961 (Reliable for Dallas, West and South Salem only)	622 (Reliable for Cities of McMinnville, Amity and Newberg, Sheridan only)	1,909 (Reliable for Salem only)	287 (Reliable for City of Tillamook only)	351 (Reliable for Cities of Astoria and Seaside only)	695 (Reliable for Silverton, Mt. Angel, Hubbard, Woodburn, Sublimity)
Black/African American 65 and over	Too small, Unreliable	Too small, Unreliable	Too small, Unreliable	Too small, Unreliable	Too small, Unreliable	Too small, Unreliable
Asian 65 and over	117 (Reliable for So. Salem only)	Too small, Unreliable	292 (Reliable for Salem only)	Too small, Unreliable	Too small, Unreliable	Too small, Unreliable
American Indian/Alaska Native 65 and over	93 (Reliable for Dallas and West Salem only)	180 (Reliable for McMinnville and Grande Ronde only)	150 (Reliable for Salem, Jefferson Stayton only)	33 (Reliable for City of Tillamook only)	Too small, Unreliable	21 (Reliable for Silverton only)
Hispanic 65 and over	301 (Reliable for West Salem only)	151 (Reliable for Dayton only)	1,084 (Reliable for Salem only)	Too small, Unreliable	Too small, Unreliable	378 (Reliable for Woodburn only)
Limited English 65 and over	Too small, Unreliable	136 (Reliable for Dayton only)	774 (Reliable for Salem only)	Too small, Unreliable	Too small, Unreliable	444 (Reliable for Woodburn, Gervais only)
Disability 18 and over	22,771	23,173	49,354	7,216	10,231	14,583

B-2 Target Populations

In an effort to identify consumers who meet the Older Americans Act criteria for targeted populations of older adults who have the greatest economic and social needs, NWSDS contracted with Portland State University to sort census data by zip code. By analyzing the data by zip code we identified where individuals meeting these characteristics live within the service area for each of the NWSDS service offices. Additionally, we contracted with a professional evaluator to consult on the best method for holding focus groups with Spanish and Russian-speaking older adults; 3 focus groups were held with Spanish speaking elders and one with Russian-speaking. The result of the demographic data analysis and the focus groups informed planning in particular for the Nutrition, Family Caregiver and Aging and Disability Resource Connection programs.

NWSDS continues to capitalize on opportunities to provide community outreach and education in a variety of settings, including local health fairs, community housing forums, Public Service Announcements in local newspapers and on local radio stations, and county fairs. A number of agency staff routinely participate in local networking groups. As an established and well-known agency among partners and other public service providers across our PSA, NWSDS is frequently consulted and invited to speak or participate in the planning and development of other community programs serving the needs of at risk populations.

Agency program brochures and meal menus are routinely translated into Spanish and Russian languages, as well as other languages upon request. The agency has 38 direct service staff employed as bilingual English/Spanish and English/Russian, and makes efforts at direct outreach to minority populations in collaboration with other community providers. Increased outreach and dialog with the two Tribes within our PSA, particularly around nutrition, family caregiver supports and health promotion are identified within our goals and objectives section. NWSDS staff routinely participate in Allies for Equality, a network of community service organizations and individuals in Marion County focused on

providing culturally competent services to the LGBTQ+ community. NWSDS has incorporated the documentary, *Gen Silent*, into its training curriculum for all staff. NWSDS has staff assigned to participate in the LGBT aging collaborative calls coordinated through AARP of Oregon.

B-3 NWSDS Services and Administration

In 1981 the Oregon Legislature enacted SB 955, codified in ORS Chapter 410. The law outlined the state policy for the provision of services to older Oregonians and adults living with physical disabilities. The General Policy at ORS 410.050 states:

The State of Oregon finds:

- *That the needs of the elderly population can be best served and planned for at the local community level;*
- *That a longer life expectancy and a growing elderly population demands services be provided in a coordinated manner and a single local agency system for such services instituted;*
- *That local resources and volunteer help will augment state funds and needed personnel;*
- *That local flexibility in providing services should be encouraged; and*
- *That a single state agency should regulate and provide leadership to ensure that the elderly citizens of Oregon will receive the necessary care and services at the least cost and in the least confining situation.*

The state policy envisioned a single point of entry to access services for older adults and people with disabilities that would be governed locally. Of the 16 Area Agencies on Aging designated by the State of Oregon, NWSDS is one of four (4) Area Agencies on Aging organized to meet this policy with a single entry point for the consumers living in its service area; the remaining areas of the state are served by both a locally based Area Agency on Aging and State of Oregon Aging and People with Disabilities' field offices.

The administrative functions of NWSDS are directed by an Executive Director and a Deputy Director, working with an additional member of an Executive Management Team. Leadership in each of the agency's six full-service offices is provided by Program Managers, who oversee the work of staff in each office. Other Program Managers have specific program oversight, such as Adult Protective Services, Operations/IT Services, Fiscal Services, Nutrition Services, and Community Program Services.

NWSDS is designated by the State of Oregon as the Area Agency on Aging (AAA) and the Aging and Disability Resource Connection (ADRC) for our 5-county service area. All Area Agencies on Aging, including NWSDS, plan and coordinate an array of community services to older adults, regardless of income, through funding from the federal Older Americans Act and a state-funded in-home services program called Oregon Project Independence (OPI). Funding for these services represent approximately 12% of the NWSDS budget, but are leveraged with community contributions and in-kind supports to touch approximately 30,000 older adults on an annual basis. These services include:

- **Supportive Services:** Information and Assistance through its ADRC (Aging and Disability Resource Connection), Advocacy, Legal Assistance, Peer Mentoring, Options Counseling, Medicare Benefits Counseling, Money Management Services and Volunteer Management;
- **Nutrition Services:** Home-Delivered Meals (Meals on Wheels), Congregate meals served in group settings, and nutrition education;
- **Health Promotion:** Evidence-based education, training and activities to assist with the management of chronic health conditions and fall prevention;
- **Family Caregiver Support:** Individual and group options counseling, training and respite care for family members and friends who are primary caregivers.

- **Elder Abuse Awareness:** Education and training about signs and prevention of elder abuse, training for individuals and businesses on how to identify and report suspected abuse.
- **Oregon Project Independence:** Personal and home care, chore services, adult day care, assistive technology, home delivered meals and service coordination assistance for older adults living at home. Participants cannot be receiving under Medicaid, and only need a modest level of support to remain in their own homes, typically 20 hour or less.

Program development and coordination is an ongoing effort to incorporate emerging needs with best practices. It primarily involves work with community partners to develop programs that meet the objectives of the Older Americans Act. An example of this work is the development of relationships with local organizations to expand the offering of activities in the area of health promotion and management of chronic health conditions particularly in the coastal counties we serve.

NWSDS as a local governmental Area Agency on Aging has exercised its option under state law to deliver public benefits and regulatory programs serving older adults and adults with physical disabilities. This means that the State of Oregon's Aging and People with Disabilities agency has no field office presence in the 5 counties served by NWSDS. This work represent 88% of NWSDS' budget and supports a workload of approximately 30,000 open cases monthly. NWSDS provides the following services in accordance with State of Oregon regulations, at 95% of what it would cost the State of Oregon to do so:

- **Program Eligibility:** Oregon Supplemental Income Program and Medical Program, Oregon Health Plan, Qualified Beneficiary Program (financial assistance for Medicare Part B costs), Supplemental Nutrition Assistance Program (SNAP);
- **Pre-Admission Screening:** Screening individuals that will be admitted to a Nursing Facility for indicators of serious mental illness

or developmental disabilities to ensure they receive the proper level of care.

- **Case Management:** Assistance to consumers eligible for services supported by Medicaid in their own home or in a licensed care facility to obtain services, assess needs, develop a service plan, monitor change of condition and follow-up.
- **Adult Protective Services:** Intake, screening and investigation of reported allegations of abuse, self-neglect, involuntary seclusion and restraint and financial exploitation. Investigation take place in the community as well as licensed care facilities.
- **Adult Foster Home Licensing and Oversight:** Licensing and regulatory oversight of Adult Foster Homes.
- **Long-Term Care Community Nursing:** Registered nursing services to consumers receiving Medicaid funding long-term services and supports who have complex medical conditions.

NOTE: Please refer to Appendix J for details of specific services provided with Older American Act (OAA) and Oregon Project Independence (OPI) funding either directly by NWSDS or through a contract with a community based organization or business.

B-4 Non-NWSDS Services, Service Gaps and Partnerships to Ensure Availability of Services Not Provided by NWSDS

The ADRC call center assisted consumers with 25,293 referrals to services during the 2017-2018 fiscal year. Of the referrals made, 53% were to services provided by NWSDS and 47% to services provided by other social services agencies. Of the referral to services not provided by NWSDS, the top referral types were:

1. Oregon Home Care Commission Registry
2. Housing Authority
3. Oregon Health Plan
4. Emergency Services

NWSDS dedicates a .5 FTE to maintain and update the resources for our service area in the ADRC database so that it remains up-to-date for use by consumers and ADRC Specialists. In October 2018, resources were at 99% updated. As the percentage has fluctuated over time, NWSDS has a plan in place to ensure resources are updated annually. Agency staff participate in the following networking meetings on a regular basis: Service Integration Team in Marion, Polk and Yamhill Counties, Emergency Housing Network sponsored by the Salem Housing Authority (this meeting has every non-profit and government social service provider in the greater Salem area), Clatsop Co. Alzheimer's Task Force, Social Services Directors meeting in Tillamook and Clatsop Co (non-profits and government providers), Senior Networking Meeting in Marion Co (many for-profit providers attend). Through partnerships, networking and resource database work the NWSDS staff maintain a high level of competency about the social services delivery network in our PSA.

A major gap in the counties served by NWSDS are the services of an Independent Living Center. To address this needed resource, NWSDS previously contracted with the Independent Living Center serving Lane County, Lane Independent Living Alliance (LILA) for the services of an Independent Living Specialist to work at NWSDS on a half time basis. The LILA staff person provided information and assistance, resource development, advocacy, and Social Security application assistance to consumers with disabilities. These services are consumer driven and designed to empower people with disabilities toward maintaining their independence. While the contract for an on-site Independent Living Specialist to work at NWSDS ended, a Memorandum of Understanding (MOU) took its place and went into effect April 1, 2018. Through the MOU, NWSDS makes referrals to LILA and coordinates on shared consumers.

Section C – Focus Areas, Goals and Objectives

C-1.1 Information and Assistance Services and Aging & Disability Resource Connection (ADRC)

NWSDS ADRC serves as the entry way to information, assistance, and services in NWSDS five county service area. NWSDS centralized delivery has proven to be crucial to the success of serving as an ADRC, contributing to the consistent and up-to-date delivery of information and assistance to seniors, people with physical disabilities, families, and caregivers inside and outside the NWSDS service area.

NWSDS has worked to successfully function as an ADRC through Alliance of Information and Referral Systems (AIRS), certified ADRC Specialists, person-centered Options Counselors, and partnerships with existing organizations including Intellectual and Developmental Disabilities and a Center for Independent Living. These partnerships have worked to bridge identified gaps in services and supports.

Additional partnerships and improved communication with partners is crucial to the success of NWSDS' ADRC. In January 2019, NWSDS became a Benefits Enrollment Center (BEC). As a BEC, NWSDS will connect people with Medicare to five core benefits they may be eligible for. These include Medicaid, Medicare Savings Programs, Supplemental Nutrition Assistance Program, Part D Low Income Subsidy, and Low-Income Home Energy Assistance Program. One partnership is with local Community Action Agencies.

With partnerships comes communication. NWSDS continues to work with current and new key partners to check-in at least semi-annually to confirm what is going well and what needs improvement. This includes any necessary modifications to referral forms or avenues.

Equally important to the success of NWSDS ADRC is the monitoring of service. Consumers most often access ADRC information by phone or through exploring resources in the online statewide ADRC Resource

Directory. To ensure the quality of NWSDS' ADRC service by phone and through ADRC Resource Directory entries, another secret shopping is underway. The feedback will be used to improve consumers' experiences when searching for resources.

Lastly, NWSDS' ADRC continues to work on awareness promotion. NWSDS regularly does outreach. NWSDS' Facebook page went live in November 2018. NWSDS continues to build on awareness through its upgraded NWSDS public website and outreach to underserved populations.

NWSDS has a long-standing budgetary commitment to the services of the ADRC; this includes funding support from the Older Americans Act as well as Medicaid. NWSDS recognizes the importance of providing comprehensive information and assistance when a consumer first makes contact with our agency.

NWSDS is dedicated to building its ADRC through additional partnerships, improved partnership communication, and awareness. NWSDS' ADRC recognizes the importance of quality in customer service.

Goals, Objectives, Strategies

Goal 1: Improve Veterans' access to VA benefits, especially rural Veterans.

- **Objective 1 (Achieved):** Establish and maintain a formal partnership with the Oregon Department of Veterans Administration (ODVA).
 - **Strategy 1.1.1 (Achieved):** Prior to January 2017, Aging and Disability Resource Connection Specialists started consumer referrals to the Veteran Benefit Specialist per approved protocol.
 - **Strategy 1.1.2 (Achieved):** Prior to February 2017, a curriculum was established to train NWSDS and partner staff on Veterans' benefits. This was done in coordination with the ODVA Veteran's LGBT Coordinator to ensure services are provided in a culturally appropriate manner.

- **Strategy 1.1.3 (Achieved):** Prior to May 2017 and ongoing, training was completed with NWSDS and partner staff on Veterans' benefits.

Goal 2: Improve communication with partners.

- **Objective 1 (Achieved):** Conduct semi-annual check-ins with key partners and improve referral forms/avenues.
 - **Strategy 2.1.1 (Achieved):** Prior to January 2017, key partners and referral sources were identified.
 - **Strategy 2.1.2 (Achieved):** February 2017 and ongoing, locations and times to meet with key partners/referral sources were scheduled.
 - **Strategy 2.1.3 (Achieved):** March 2017 and ongoing, met with key partners/referral sources to discuss what was going well and/or needed improvement.
 - **Strategy 2.1.4 (Achieved):** April 2017 and ongoing, discussed referral processes and improvements with key partners.
 - **Strategy 2.1.5 (Achieved):** June 2017 and ongoing, modified referral forms/processes and looped back with key partners.

Goal 3: Enhance customer service and planning.

- **Objective 1:** Conduct ADRC Secret Shopping for phone and resource directory feedback.
 - **Strategy 3.1.1 (Achieved):** June to August 2017, completed Secret Shopping and later provided analysis and recommended action steps to ADRC staff and NWSDS Advisory Councils. Report was finalized with NWSDS Advisory Councils Monitoring Committee.
 - **Strategy 3.1.2:** As of January 2019, began Secret Shopping of the ADRC Resource Directory. An analysis and recommended action steps to ADRC staff and NWSDS Advisory Councils will be done by May 2019.

Goal 4: Promote awareness of ADRC and its purpose.

- **Objective 1 (Achieved):** Increase in consumer contact by 10% annually.
 - **Strategy 4.1.1 (Achieved):** March 2017 and ongoing, quarterly outreach to underserved populations, including outreach to Russian and Spanish speaking populations using focus group findings.
 - **Strategy 4.1.2 (Achieved):** November 2017 and prior, updated NWSDS external website utilizing information from NWSDS website workgroup and feedback from NWSDS Advisory Councils.
 - **Strategy 4.1.3 (Achieved):** December 2017, released NWSDS upgraded website.
 - **Strategy 4.1.4 (Achieved):** March 2018, a Dementia Friendly Business Campaign event was held at Center 50+ in Salem.

Goal 5: Ensure Person Centered Options Counseling (PCOC) is delivered in accordance with state standards.

- **Objective 1 (Achieved):** Perform quality assurance checks on work completed by Options Counselors.
 - **Strategy 5.1.1 (Achieved):** September 2018, developed a monitoring tool that addresses six core competencies of PCOC including; determining need for PCOC, person centered assessment, education on community resources, facilitate consumer self-direction, assist with future planning and individual follow-up.
 - **Strategy 5.1.2 (Achieved):** December 2018 and ongoing, review two to five completed Care Tool records for each Options Counselor at each six month performance evaluation. The newly developed monitoring tool is used to gauge effectiveness in delivering PCOC in the six areas noted above as records are reviewed.

C-1.2 Nutrition Services

The current NWSDS foodservice and delivery model in the coastal counties of Clatsop and Tillamook, includes a central kitchen located at Pacific City operated by a contracted vendor (Bateman). Fresh meals, both hot and deli are prepared at the central kitchen, and delivered in bulk to the 5 separate meal site locations. In addition, individually portioned frozen meals are provided and delivered in a frozen state to each meal site location.

The current production and delivery model for coastal counties is the hot and fresh meal production which is prepared daily at the Pacific City kitchen and delivered Mondays, Wednesdays, and Fridays in a NWSDS foodservice van. Some food handling and re-heating of meals is required. A second vendor prepares fresh meals on site at the community center in Warrenton and delivers to home bound seniors in the Warrenton area on Monday and Thursday each week.

Each coastal meal site location provides congregate and home delivered services and is managed by NWSDS employees, with the exception of Seaside, where the site coordinator is an employee of Sunset Empire Parks and Recreation under contract with NWSDS. Sites are currently located at:

<u>City</u>	<u>Location</u>	<u>Days of Operation</u>
Nehalem	United Methodist Church	Tuesday and Thursday
Pacific City	Kiawanda Community Center	Monday - Friday
Tillamook	Senior Center	Monday-Friday
Seaside	Bob Chisholm Community Ctr	Monday – Friday*
Svensen	Wickiup Grange Hall	Wednesday and Thursday

** Managed by Sunset Empire Parks and Recreation*

The current foodservice and delivery model in the valley counties of Marion, Polk and Yamhill includes a central kitchen, owned by NWSDS, located at Salem and operated by a contracted vendor (Bateman). Fresh meals, both hot and deli are prepared at the central kitchen, and delivered in bulk to the 9 separate meal site locations where NWSDS employs site

coordinators with the exception of Newberg, where the site coordinator is an employee of the Chehalem Park and Recreation District under contract with NWSDS. In addition, individually portioned frozen meals are provided and delivered in a frozen state to each meal site location.

NWSDS partners with Marion-Polk Food Share (MPFS) who operates a combination of fee-based and OAA donation based congregate and home-delivered meal program for the greater Salem-Keizer area from Center 50+, City of Salem Senior Center and as of 2017 in the South Salem Senior Center. Meals are cooked and prepared at a Center 50+ central kitchen. MPFS service delivery area includes all of the Salem-Keizer zip codes. MPFS also has financial aid available for the purpose of helping older adults who are unable to pay for meals.

NWSDS also partners with the McMinnville Park and Recreation District who operates a fee-based salad bar lunch at the McMinnville Senior Center on Tuesday and Thursday.

The current production and delivery model in the valley meal sites is the hot and fresh meal production which is prepared daily at the kitchen and delivered daily in NWSDS foodservice trucks. Some food handling and re-heating of meals is required. Frozen meals are typically delivered one day per week to each site.

Each OAA supported meal site location in the valley provides congregate and home delivered services, and is managed by NWSDS employees, with the exception of Newberg and Salem-Keizer. Sites are currently located at:

<u>City</u>	<u>Location</u>	<u>Days of Operation</u>
Mt. Angel	Community Center	Tuesday and Thursday
Silverton	Senior Center	Monday - Friday
Stayton	Community Center	Monday, Wednesday & Friday
Woodburn	First Presbyterian Church	Monday-Thursday
Dallas	La Creole Manner	Monday, Wednesday & Friday
Monmouth	Senior Center	Tuesday and Thursday – culturally specific congregate meal site.

Newberg	Senior Center	Monday-Friday
McMinnville	Senior Center	Cong. = M, W; HDM = M-F
Sheridan	United Methodist	Monday, Wednesday & Friday

The contract with Bateman is with a consortium of three (3) Area Agencies on Aging with NWSDS in the management role of the contract. The other AAAs are Oregon Cascades West Council of Governments serving Linn, Benton and Lincoln Counties and Lane Council of Governments serving Lane County. Hot, fresh and frozen meal production in the Salem kitchen includes the NWSDS Counties of Marion, Polk and Yamhill, and productions for Linn, Benton and Lane Counties. Bateman also operates a kitchen in Lincoln and Lane Counties under this contract. All frozen meals are produced at the Salem kitchen. Each AAA owns its own food delivery trucks that are driven by Bateman staff. Since NWSDS owns the Salem kitchen it is responsible for its maintenance and equipment; the two AAA partners pay an agreed upon facility fee for each meal produced in the Salem kitchen; this fee is evaluated annually. Funds are maintained in a facility reserve account at NWSDS. For any additional business by Bateman (where they contract with another business entity) there is an additional business facility fee per meal, which must be approved by NWSDS.

The kitchen is 30 years of age and the projected upkeep costs of the building and equipment are a risk for NWSDS based on the current level of the facility reserve. NWSDS has developed and initiated a capital replacement plan to evaluate the structure and equipment needs of the kitchen. On January 2019, an RFP for commercial kitchen renovation was issued.

The Nutrition Program is managed within the Community Services Programs of NWSDS, this unit delivers all the Older Americans Act program services for the agency. Every effort is made to integrate the nutrition program with other OAA supported services. Examples of such integration include but are not limited to: the cross training of nutrition staff in evidence-based health promotion programs such as Living Well with Chronic Health Conditions; the scheduling of health promotion programs

such as Tai Chi in conjunction with meal program times; the location of congregate meal programs with entities, such as senior centers, where other OAA program services are contracted; the training of nutrition staff on Mental Health First Aid and Suicide Prevention.

Over the next four years, NWSDS Nutrition Services program will be focusing its efforts to address food insecurity for older adults, the underutilization of the congregate meal program, increase recruitment and retention of volunteers and the promotion of health for older adults by improving its delivery of nutrition education.

Goals, Objectives, Strategies

Goal 1: Reduce older adult hunger and food insecurity.

- **Objective 1.1:** Strengthen partnerships with local community partners within NWSDS' service delivery area to address hunger and food insecurity.
 - **Strategy 1.1.1 (Achieved):** In 2017 and ongoing, Sheridan meal site coordinator attends a monthly local resource sharing community group. As of October 2018, nutrition staff participate in quarterly community partner meetings in Polk County to share resources regarding hunger and food-insecurity, locations of food pantries, and information necessary to avoid service duplication.
 - **Strategy 1.1.2 (Achieved):** Instead of meeting with food banks to discuss a memorandum of understanding, site staff contacted each local food bank in their area to educate its staff and provide materials on Nutrition Programs and SNAP. Additionally, NWSDS entered into contract with Marion-Polk Food Share to operate congregate and home-delivered meal programs in the Salem-Keizer area through Center 50+ and South Salem Senior Center, using OAA request for proposal to serve on a donation basis.

- **Strategy 1.1.3 (Achieved):** In 2017 and ongoing, continue to support the Brown Bag Program in Tillamook County by providing a bag of groceries to food insecure seniors. Grocery style food is provided by the food bank on the last week of every month at all NWSDS coastal congregate meal sites. Congregate meal site diners are able to pick own food while volunteers help package and deliver brown grocery bags to home-bound seniors.
- **Strategy 1.1.4:** By September 2019, pilot a pet food program at a valley NWSDS meal site.
- **Objective 1.2 (Achieved):** Increase outreach to older adults about Supplemental Nutrition Assistance Program (SNAP) benefits.
 - **Strategy 1.2.1 (Achieved):** October 2017 and ongoing, NWSDS' Quality and Assurance staff trained Nutrition staff and volunteers on SNAP basics.
 - **Strategy 1.2.2:** April 2018, shared English, Spanish and Russian SNAP educational materials, found on DHS form server, throughout meal sites.
 - **Strategy 1.2.3 (Achieved):** October 2017 and ongoing, existing SNAP information was utilized to train staff and volunteers on the benefits of SNAP enrollment for older adults. In addition, staff incorporated talking points on different ways consumers can donate to the Nutrition program; such as utilizing SNAP donations through a voucher system.
 - **Strategy 1.2.4 (Achieved):** October 2017 and ongoing, existing SNAP information and brochures were incorporated in HDM in-home assessments.

Goal 2: Promote socialization of older adults.

- **Objective 2.1:** Develop and implement a communication and outreach plan with metrics for the NWSDS Nutrition Services Program.

- **Strategy 2.1.1:** Due to the unavailability of interested partners, the feasibility of a “Pop-up Center”, modeled after SCAN in New Jersey, to deliver shelf-stable meals, health screenings, service information, I&A, benefits counseling to Spanish-speaking older adults, was unattainable.
- **Strategy 2.1.2 (Achieved):** January 2017 and ongoing, translated the Hot/Fresh menu, Frozen Meal menu, and Nutrition Program brochure to Spanish. Community outreach is being conducted via local Woodburn Community Radio show every Friday, PSA announcements in a local Polk County radio station, Spanish brochures and flyers, and via newsletters to community partners engaging with limited English speaking older adults. In 2019, Nutrition Manager has been attending a strategic planning meeting to discuss a multicultural community center in Woodburn.
- **Strategy 2.1.3:** By December 2018, develop a three year communication/marketing plan.
- **Objective 2.2:** Increase transportation opportunities for older adults to participate in the Congregate Meal Program.
 - **Strategy 2.2.1:** By December 2019, understand current transportation options and align services with meal site operations by meeting with local transportation providers.
 - **Strategy 2.2.3:** By December 2020, explore non-traditional transportation options such as faith community vehicles, Uber, community organizations, carpooling; investigate best practices with Impact Northwest. Provide list of non-traditional transportation options, where feasible, to consumers utilizing the Congregate Nutrition Program.
- **Objective 2.3:** Increase congregate meal site participation/utilization.
 - **Strategy 2.3.1 (Achieved):** January 2017, a complete Request for Proposal for Tillamook and Clatsop County was released to engage potential providers in a community-based service

delivery model. The request for proposal utilized an equitable model to generate interest in local entities. The Request for Proposal was shared through ORPIN, Oregon Restaurant Association, and the local school districts. The Request for Proposal remained the same as prior years; with Bateman and Warrenton Senior Citizens Inc, being the primary vendors.

- **Strategy 2.3.2 (Achieved):** June 2018, established a partnership with Grande Ronde to serve HDM to non-tribal members that live within the tribe's service area.
- **Strategy 2.3.3:** October 2018, explored the feasibility to replicate the Soup and Salad Bar model operating as the McMinnville Café by issuing a Request for Proposal in the valley and the coast; there was no interest in the model.
- **Strategy 2.3.4 (Achieved):** January 2018, a culturally specific meal site, serving Spanish-speaking older adults and modeling Catholic Charities' *Programa Para Personas De La Tercera Edad*, was established in Polk County. Meal site operates on Tuesdays and Thursdays and has a .5 FTE Bi-lingual (Spanish/English) Meal Site Coordinator.
- **Objective 2.4:** Volunteer Engagement, increase the number of active Nutrition volunteers by 20% and eliminate reliance on paid staff for home-delivered meal routes.
 - **Strategy 2.4.1:** July 2018, updated a Volunteer Handbook and created volunteer position descriptions which were presented to Coastal Site Coordinators in November. Handbook presentation included mandatory forms, policies, expectations, and tools to assist with volunteer coordinating. A presentation is scheduled with Valley Site Coordinators in February 2019.
 - **Strategy 2.4.2:** December 2018, developed and presented a comprehensive volunteer training program that included agency services, and policies outlined in NWSDS' Volunteer Handbook. Training was given to Woodburn's meal site

volunteers. Trainings will continue through 2019 in other meal site locations.

Goal 3: Promote health and wellbeing of older adults.

- **Objective 3.1:** Improve quality of nutrition education.
 - **Strategy 3.1.1 (Achieved):** June 2017, educated Nutrition staff on early signs of common chronic health conditions.
 - **Strategy 3.1.2 (Achieved):** December 2017, contracted with Oregon State University Extension Program to provide cooking classes to meal site participants and partnered with food pantries to incorporate fresh produce at meal sites.
 - **Strategy 3.1.3:** By December 2019, research effective evidence based in-home assessment surveys or in-home tests that help screen for malnutrition and food insecurity.

C-1.3 Health Promotion

NWSDS has made a concerted effort to move towards offering only evidence-based programs of the highest level of evidence. The programs we plan to provide over the next four years will focus on the following; developing the self-management skills of seniors and people with disabilities as it relates to managing their chronic health conditions; maintaining older adults in their homes and community-based settings as much as possible by offering in home and in community fall prevention programs, expanding programs that focus on common mental health conditions such as anxiety and depression, and offer health promotion and wellness programs to prevent the development of disease.

One fairly unique aspect to NWSDS health promotion efforts is the inclusion of the Otago Exercise Program. This program focuses on at-risk, homebound, older adults, those most likely to sustain a fall. While most exercise programs require an older adult to travel to a community setting, Otago trained individuals deliver services at the consumer's home.

Following is a list of the evidence-based health promotion/disease prevention programs we intend to offer or have been offering:

Self-Management:

- 1) Stanford's Chronic Disease Self-Management Program (CDSMP) and Workplace Chronic Disease Self-Management (wCDSMP) which is an adaptation of CDSMP only used in the workplace.*
- 2) Stanford's Diabetes Self-Management Program (DSMP)*
- 3) Stanford's Chronic Pain Self-Management program (CPSMP)*
- 4) Stanford's Cancer Thriving and Surviving Program (CTSP)*
- 5) Stanford's Tomando Control
- 6) Stanford's Programa de Manejo Personal de la Diabetes
- 7) Diabetes Empowerment Education Program (DEEP)

* Classified as *Living Well* in this document.

Fall Prevention

- 1) The Otago Exercise Program (OEP)
- 2) HomeMeds
- 3) TaiChi: Moving for Better Balance
- 4) A Matter of Balance
- 5) AEA Arthritis Foundation Aquatic Program (AFAP)
- 6) AEA Arthritis Foundation Exercise Program (AFEP)
- 7) Tufts Strong Women Program
- 8) Enhanced Fitness

Mental Health

- 1) Peer Mentor Program
- 2) Mental Health First Aid for Older Adults

Health Promotion/Disease Prevention

- 1) CDC National Diabetes Prevention Program (NDPP), in English and Spanish
- 2) Care Transitions Intervention (CTI)
- 3) Aging Mastery Program, Aging Mastery Program for Caregivers and Aging Mastery Program Starter Kits.

Access to Programs: Programs will be made accessible to at-risk older adult populations in all 5 counties by contracting, whenever possible, with local providers or training NWSDS staff to provide the service. According to Healthy People 2020 objectives, there are many factors that affect the health, function and quality of life of older adults, and that the behavior of the individual is a critical determinant of health. “Programs that promote participation in physical activities, self-management of chronic diseases or use of preventative health services, can improve health outcomes” (Healthy People 2020 – Older Adults). In addition, by sponsoring leader trainings for evidence-based programs, we can help to insure an adequate workforce to provide the programs.

Linking consumers to the evidence-based health promotion programs and then having them attend and complete the classes requires a multi-faceted approach. Working closely with potential referral services to identify and encourage consumers to attend a program is one of the first steps. Recent research (Ritchie & Swigert, 2016) shows that “primary care providers (PCPs) have emerged as a potentially effective source for identifying and encouraging patients who can benefit from [programs such as] the National DPP (NDPP)”.

Over the next four years, there are at least two groups/populations that we hope to specifically work with; the first is The Confederated Tribes of Siletz Indians and The Confederated Tribes of Grand Ronde. Our goal would be to offer support to the development of culturally appropriate health promotion programs in their communities. NWSDS provided trainings in a train –the- trainer format to two leaders in Grand Ronde. This allowed tribal members to be certified to teach evidence-based classes in the community,

however, the trainers left their positions with Grand Ronde and classes have come to a halt. NWSDS is planning to submit a grant application at the end of January 2019, which will allow the opportunity to offer caregiver classes for Alzheimer's and Dementia. NWSDS is planning to partner with Siletz in order to bring these classes to four different counties.

The second group are Spanish-speaking older adults and people with disabilities. There are three evidence-based programs that NWSDS plans to expand specific to this population. These programs are Stanford University's *Tomando Control de su Salud*, *Programa Manejo de la Diabetes*, and the CDC Diabetes Prevention Program in Spanish. NWSDS already has two independent contractors trained in all three of the programs. NWSDS is looking for sites, with the ability to have these classes offered at least one time per year in every county we currently serve.

Program Integrity and Availability: Evidence Based Programs often have a set curriculum making it easier to insure fidelity. Doing a fidelity check on all leaders at least one time per year is a goal of the program and is key to insuring quality. Tracking fidelity checks and continuing education credits of direct service providers required for accreditation or certification of programs is also important and is a function of the Health Promotion Coordinator at NWSDS. Finally, compiling and publicizing a monthly calendar of upcoming events and classes related to health promotion and wellness in each local community is something NWSDS intends to continue over the next four year period.

Goals, Objectives, Strategies

Goal 1: Expand Evidence-Based Health Promotion/ Disease Prevention Programs to all five counties.

- **Objective 1.1 (Achieved):** Expand the Otago Program to Yamhill, Clatsop and Tillamook Counties.
 - **Strategy 1.1.1:** April 2017 and ongoing, efforts to recruit a Certified Personal Trainer (CPT) in Yamhill County continues.

At this time NWSDS' Clinical Coordinator covers McMinnville, Willamina and Sheridan. The Certified Occupational Therapist Assistant recruited in Yamhill County is no longer offering services, as a results participation numbers are low. We also did extensive outreach to ALFs in Sheridan in early 2018 but most of those consumers have moved on. However, a resident of Sheridan was hired to do Tai Chi classes in Sheridan and in Willamina.

- **Strategy 1.1.2:** May 2017 and ongoing, internal NWSDS staff and external community partners in Yamhill County are being educated as part of a larger effort to make them aware of all community programs and to increase the number of consumers referred to programs; including the Otago program and referral process. Staff continues to receive information on the programs and referral process up to twice a year. In 2018, the referral process was streamlined and now goes through the ADRC.
- **Strategy 1.1.3:** September 2017 and ongoing, contracted with the YMCA Tillamook to train 3 of their Certified Personal Trainers to implement Otago in Tillamook County and hired and trained one Physical Therapist in Clatsop County who will be completing initial evaluations. In 2018, Clatsop County's Physical Therapist continues to travel to Tillamook to provide Otago. An Assisted Living Facility in Tillamook is a target location due to the high rate of falls and need for fall prevention services, such as Otago.
- **Strategy 1.1.4:** October 2017 and ongoing, internal NWSDS staff and external community partners in Tillamook and Clatsop Counties are being educated as part of a larger effort to make them aware of all community programs and to increase number of consumers referred to programs; including the Otago program and referral process. In 2018, this strategy

continues to be effective, specifically with Case Management staff.

Goal 2: Increase funding sources for Health Promotion Services in order to serve more consumers.

- **Objective 2.1:** Support and contract with Oregon Wellness Network, whose intent is to become a statewide Medicare provider for Medicare eligible benefits such as Diabetes Self-Management Program (DSMP) and Diabetes Prevention Program (DPP).
 - **Strategy 2.1.1:** January 2017, completed market analysis and break-even analysis of DSMP and DPP. NWSDS provides DPP services through its contract with OWN which is a Medicare supplier. This allows NWSDS to see both Medicare FFS and Medicare advantage plan members. As of January 2019, Coordinated Care Organizations are also scheduled to pay for DPP.
 - **Strategy 2.1.2:** March 2018 and ongoing, contracted with a Registered Dietician, who will begin review of DSMP and acquire American Association of Diabetes Educators (AADE) accreditation of NWSDS Diabetes Self-Management Education Program. By December 2019, OWN intends to apply for AADE accreditation in order to become a Medicare Provider for DSMP.
 - **Strategy 2.1.3(Achieved):** June 2017 and ongoing, applying and securing a Medicare Provider number is part of a larger effort under O4AD Oregon Wellness Division (OWN). OWN is now a Medicare supplier for DPP. NWSDS contracts with OWN as the service coordinator and due to this effort, the Agency is now part of a larger statewide network with greater resources.
- **Objective 2.2:** Negotiate contracts to pay for Care Transition Services (CTS).

- **Strategy 2.2.1:** By April 2019, establish contract with Medicare Advantage Companies (ex. Regence) to pay for Care Transition Services in Marion and Polk County.
- **Strategy 2.2.2:** By Dec 2019, establish contract with Providence through APD to provide CTS in Providence Seaside and Providence Newberg. This includes negotiating payment with their health plan to pay for their members.

Goal 3: Implement an evidence-based medication management program.

- **Objective 3.1:** The HomeMeds program will be fully integrated with the Otago program.
 - **Strategy 3.1.1 (Achieved):** March 2017 and ongoing, contracted with HomeMeds. From March 13-14, 2017, HomeMeds trained 22 staff from NWSDS and partnering agencies. HomeMeds system was tested from March to April, 2017 and an updated version was implement in May. Currently utilizing HomeMeds for new Otago cases in Marion, Polk, Yamhill and Clatsop Counties.
 - **Strategy 3.1.2 (Achieved):** May 2017 and ongoing, HomeMeds was fully integrated into all programs, with the exception of Tillamook County, where implementation has just begun.
 - **Strategy 3.1.3:** By December 2019, Contract with Care Transition to include HomeMeds, and begin offering it in Providence Newberg and Providence Seaside.

C-1.4 Family Caregiver

NorthWest Senior & Disability Services Family Caregiver Support Program (FCSP) serves both caregivers caring for adults with functional disabilities and relatives raising children. The program offers all six of its core elements which include; training, support groups, counseling, respite, and

supplemental services, as well as information and assistance, in all five of the counties we serve.

All initial contacts for service are screened through the Aging and Disability Resource Connection (ADRC) staff. These staff are required to be AIRS certified and trained on Agency programs, as well as other resources available in the community that may be of interest to the caregiver. Referrals then go to the assigned FCSP Specialist in the county the caregiver resides. All five of our counties are served by a FCSP Specialist, who conducts an assessment in the caregiver's home or Agency office, at the caregiver's preference.

After a holistic assessment is completed by the FCSP Specialist and the caregiver is determined eligible to receive FCSP services, an explanation of benefits is given to the caregiver in writing as well as agreed upon next steps to take to assist caregiver in achieving stated goals. Telephone follow-up is initiated by the FCSP Specialist within one month of enrollment to answer any additional questions and check in on progress toward tasks identified in the action plan process. Status of other referrals made by the FCSP Specialist will be addressed at that time as well. Currently, caregivers continue to receive FCSP services through NWSDS as long as they meet eligibility criteria and funding is available.

As noted above, NWSDS FCSP supports all six core FCSP services for both family caregivers and relatives raising children as follows:

Training

NWSDS has six FCSP Specialists trained in the evidence based Savvy Caregiver series, as well as contracted providers in our service area that are trained in this curriculum. NWSDS supports Savvy Caregiver in the five counties we serve. Additionally, all six FCSP Specialists are trained in Aging Mastery and one FCSP Specialist in Wellness Initiative for Seniors Education (WISE). NWSDS also supports monthly caregiver training on a wide range of

topics of interest to caregivers including; disease specific education (Parkinson's, Alzheimer's) and general caregiving tips (bathing, dealing with difficult behaviors). NWSDS also sponsors an annual conference for relatives raising children in which special speakers are brought in to address topics of interest to this population of caregivers. Formal trainings are conducted in a group format, while a great deal of training occurs one on one between FCSP Specialists and caregivers during the face to face assessment and ongoing case management provided. Currently, formal trainings, such as Savvy Caregiver, Aging Mastery, and WISE, are only offered in a group setting and are not available in the caregiver, or care receiver's home.

An additional area of interest noted by enrolled caregivers is the creation of a mentoring program. They envisioned a way to match experienced caregivers with those new to caregiving. Allowing those without caregiving experience to learn more from those who know what it is truly like to care for someone.

Support Groups

NWSDS offers at least one support group in all of our five counties. In Clatsop County, the support group is held at the local NWSDS office, supervised by the Clatsop FCSP specialist, and led by a volunteer. The format of each support group varies according to local need. Some come to fruition after a Savvy Caregiver series, others are long standing with monthly topics of the groups choosing. A relatives raising children support group is offered in Marion County only at this time.

Supplemental Services

Supplemental Service benefits are extended to all eligible caregivers with maximum amounts set according to type of caregiver (those caring for adults versus relatives raising children). Typical reimbursement requests in this category include; medical equipment, incontinence supplies for older

adults and tutoring, extra curriculum school fees for children. Caregivers submit standard forms and receipts for reimbursement.

Counseling

All enrolled caregivers receive six visits with a licensed counselor of their choosing at no charge. Covered number of visits can be extended if situation warrants. Counselors either request reimbursement directly from NWSDS or are paid by the caregiver and caregiver then requests reimbursement using standard forms.

Respite

Respite reimbursement is available to all eligible, enrolled caregivers. A maximum dollar value of reimbursement exists and renews each fiscal year, provided caregiver continues to meet eligibility criteria. Because payment is offered as a reimbursement, caregivers are free to select an adult respite provider of their choosing. Caregivers submit standard forms and receipts for reimbursement.

Information and Assistance

NWSDS and our contracted providers conduct a wide range of outreach activities in all five counties, reaching thousands of caregivers annually. Face to face presentations at health fairs, county-wide service integration teams, faith communities, county self-sufficiency offices, health care community partners, as well as radio and print ads, ensure that NWSDS is getting the word out about available FCSP services. Additionally, NWSDS has had a presence on the Native Caring Conference Planning Committee for several years. This annual conference is a collaborative effort by the nine tribes in Oregon to bring a networking and training opportunity to tribal unpaid caregivers all over Oregon. Participation in this committee and conference allows for information sharing with the tribes in our service area about NWSDS' FCSP and encourages greater collaboration of efforts.

Finally, participation in local service integration teams and statewide committees by NWSDS staff has created further opportunity for information sharing amongst NWSDS and tribal staff.

In anticipation of the current Area Plan process, a focus group of current and previously enrolled FCSP caregivers was brought together to solicit their feedback on the FCSP at NWSDS. The following goals and objectives for the next four years are a direct outcome of suggestions and comments from these caregivers.

Goals, Objectives, Strategies

Goal 1: Support at least 1 Savvy Caregiver Training series per year in each of the five counties.

- **Objective 1.1 (Achieved):** All NWSDS Family Caregiver Support Specialists are trained and ready to lead Savvy Caregiver Series.
 - **Strategy 1.1.1 (Achieved):** December 2017, trained all six NWSDS Family Caregiver Support Specialists on how to lead Savvy classes. Additionally, as of 2017, savvy classes are offered in all 5 counties.
- **Objective 1.2:** By December 2019, increase the number of Savvy Caregiver classes offered by community partners by 20%.
 - **Strategy 1.2.1:** By 2018-2019 contract cycle, complete inventory of trained providers and contract with existing community partners providing Savvy Caregiver in Marion and Polk County to increase class offerings, where feasible.
 - **Strategy 1.2.2:** By September 2019, identify community partners in all five counties of the NWSDS service area interested in providing Savvy Caregiver and complete required training with the partners.

Goal 2: All Family Caregiver Support Program (FCSP) Specialists discuss Veterans, Medicaid and Private Pay options for Long-Term Services and Supports with FCSP caregivers.

- **Objective 2.1 (Achieved):** All FCSP Specialists are trained in Veterans Administration (VA) benefits.
 - **Strategy 2.1.1:** March 2017 and ongoing, training curriculum on VA benefits was finalized in collaboration with Oregon Veterans Administration.
 - **Strategy 2.1.2:** July 2017 and ongoing, four VA trainings for NWSDS staff and one VA training specifically for family caregivers were held. In January 2018, all FCSP specialists completed training on VA benefits and reviewed/ revised existing written materials for caregiver audience.

Goal 3: Provide evidence based intervention for Alzheimer's and Dementia care.

- **Objective 3.1:** Due to the unavailability of the Star-C program training for our FCSP Specialists, the Aging Mastery and WISE program is provided to family caregivers in Marion and Polk County.
 - **Strategy 3.1.1 (Achieved):** November 2018, the Polk County FCSP Specialist completes evidence based training for Wellness Initiative for Senior Education (WISE) program from New Jersey Prevention Network.
 - **Strategy 3.1.2 (Achieved):** February 2019, all FCSP Specialists complete training for Aging Mastery Program developed by the National Council on Aging (NCOA).
 - **Strategy 3.1.3 (Achieved):** January 2019 and ongoing, offer 12 week Aging Mastery Program in Marion and Polk County.
 - **Strategy 3.1.4:** By October 2019 offer WISE program to family caregivers in Jefferson.

C-1.5 Elder Rights and Legal Assistance

NWSDS Adult Protective Service Unit addresses elder abuse by responding to allegations of abuse, investigating, and providing interventions to stop the abuse from continuing. The role of Adult Protective Services is reactionary in nature. Adult Protective Services responds only when there is an allegation that abuse has occurred. This type of reactionary response is dictated by the Administrative Rules and mandates that guide the programs, however it does little to prevent abuse.

The Community partners that NWSDS Adult Protective Services collaborates with also respond to specific incidents after they have occurred. NWSDS Protective Service workers attend Multi-Disciplinary Team (MDT) meetings in all five counties of the NWSDS service area. MDT Meetings occur monthly and provide an opportunity for collaboration with community partners on shared cases. MDT Meetings also allow NWSDS Protective Service Workers to build relationships with Community Partners and gain a better understanding of the resources available in the community. The collaboration and relationships that are built allow for a joint effort when assisting consumers in crises. When resources are combined, consumers receive the best service possible.

NWSDS recognizes the value and need to research and review evidence based ideas to prevent abuse as well as respond to abuse when it occurs. At this time there are no nationally recognized evidence based programs to prevent elder abuse, however there is an evidence based communication approach to elder abuse. Each state collects information on their own independent databases and defines abuse with different terms. Oregon now has a statewide Centralized Abuse Management (CAM) system, which allows for information collection to review and analyze trends of abuse. CAM began July 2018 and by December 2018 it was rolled out throughout the entire state.

Historically, NWSDS has utilized prevention funding to conduct outreach events and trainings in our five county service area. We have dedicated funding to radio advertisements, advertisements on the internet, signs for

our buildings, and outreach items such as pens that provide the phone number to report abuse. While this type of outreach educates the public on how to report abuse, it does not get to the root of prevention. Studies show that mass education of older adults is failing to prevent abuse due to many factors; messages regarding prevention tend to be negative, often our population is afflicted with a form of dementia, and the underlying causes of exploitation have yet to be discovered.

Financial Exploitation is the most frequently investigated type of abuse in Oregon according to a 2013 study. The number of Financial Exploitation investigations increased by 18% between 2011 and 2013. It is clear that this type of abuse is on the rise and it is crucial that NWSDS finds a way to develop a plan to prevent further cases. NWSDS will focus prevention efforts on researching the causes of Financial Exploitation so that we may gain knowledge in which to combat this continuing trend of abuse.

In order to create a viable prevention plan, the causes of Financial Exploitation must be determined. In an effort to determine the causes of Financial Exploitation, NWSDS reviewed substantiated abuse reports which provided data on trends of Financial Exploitation. The collected data did not identify the root causes of financial exploitation, but did provide evidence that hosting focus groups with reported victims, as initially planned, would not be helpful. Based on this review, the Agency met with the Oregon Bankers Association to discuss and brainstorm ideas for consumers who are unable to get to the bank, buy groceries, or pay bills. The Bankers Association indicated that an account similar to a high school checking account where the consumer can transfer money, set limits on the amount spent, etc. is available. Additionally, presented at a Conference for approximately 300 caregivers regarding Abuse Awareness and Reporting. Discussed Financial Exploitation and ways to recognize and prevent elder abuse. Due to these limited findings, a shift was made towards an evidence based communication approach to elder abuse. Talking Elder Abuse, is a toolkit, sponsored by Archstone Foundation, The John A. Hartford Foundation, and Grantmakers in Aging, and in partnership with the

National Center on Elder Abuse at the Keck School of Medicine of the University of Southern California, that models how to apply the FrameWorks Institute's evidence-based recommendations to messages and conversations about elder abuse and related issues, in order to build public understanding and support.

Research indicates that the majority of reported victims are abused by someone they know. Often the victim is dependent upon their abuser for care. In an effort to reduce the abuse vulnerable adults experience at the hands of their caregivers, NWSDS developed training for Adult Foster Home Providers and Home Care Workers on abuse prevention as well as the Adult Protective Service investigative process. These trainings offered knowledge and education to caregivers on what constitutes abuse, warning signs, as well as tools and resources to reduce the stress that accompanies caring for vulnerable adults. Trainings were developed in cooperation with the Oregon Home Care Commission and provider associations.

NWSDS contracts with Legal Aid Service of Oregon to provide legal assistance to aging adults in Marion and Polk Counties and with the Oregon Law Center to provide legal assistance of older adults living in Yamhill, Clatsop and Tillamook Counties. NWSDS resources these contracts with Older Americans Act funds. Each organization provides NWSDS the number of hours of legal assistance provided by type each month. In order to maximize the support legal aid provides, NWSDS Adult Protective Service staff will meet with Legal Aid to learn about their services, case priorities, and legal resources that are offered. In addition, NWSDS met with Legal Aid to provide information on the investigative process and interventions that Adult Protective Services can offer. This collaborative effort provided Adult Protective Service and Legal Aid staff with additional resources, knowledge, and exposure to the gaps in the legal services available to the aging population both parties serve. With knowledge of these gaps, together NWSDS and Legal Aid can research and find additional resources to fill the gaps.

World Elder Abuse Awareness Day is held each year on June 15. The purpose of this day is to educate communities on the prevalence of elder abuse with the hope that awareness will cause us all to respond in a way that prevents the abuse from occurring in the future. NWSDS has organized past events that include information, panels, and videos. We have received excellent feedback from participants in these events. NWSDS will plan and hold a World Elder Abuse Awareness Day event that will include speakers, local community partners, and those involved in the field of Protective Services to raise awareness in our local communities.

NWSDS strives to create a prevention plan that is viable and valuable. Much has been learned from past prevention plans and strategies. It is with this knowledge that we go forward to protective vulnerable adults with a solid preventative strategy.

Goals, Objectives, Strategies

Goal 1: Collect data on the causal factors of Financial Exploitation.

130 Cases Reviewed in 2017:

- 53% of Reported Perpetrators (RPs) are family
- 15% are caregivers
- 30% of substantiated cases are due to the Victim giving someone their debit card to assist the victim with buying groceries, paying bills, etc.

Due to the majority of RPs being family members, conducting focus groups may not be the ideal strategy. Staff discussed and brainstormed alternative and more effective approaches to prevention, specifically implementing *Talking Elder Abuse* toolkit, an evidence based communication approach to elder abuse.

- **Objective 1.1:** Follow evidence based *Talking Elder Abuse* toolkit help community members increase public understanding of elder abuse.

- **Strategy 1.1.1:** June 2019, train APS outreach staff and ADRC on toolkit, on how to reframe elder abuse discussions and gather information on typical target audience found at outreach events.
- **Strategy 1.1.2:** June 2019, train APS outreach staff and ADRC on toolkit, on how to reframe elder abuse discussions and gather information on typical target audience found at outreach events.
- **Strategy 1.1.3:** February 2020 and ongoing, share new outreach materials with community partners, consumers, and target audiences.

Goal 2: Develop training on Abuse Prevention and Adult Protective Services (APS) process for care providers.

- **Objective 2.1 (Achieved):** Conduct three (3) trainings with Home Care Workers (HCW) on abuse prevention in cooperation with the Oregon Home Care Commission.
 - **Strategy 2.1.1 (Achieved):** October 2017, reviewed APS reports involving HCW for prevalence of abuse type.
 - **Strategy 2.1.2 (Achieved):** November 2017 and ongoing, developed and conducted three trainings for HCWs and developed an Oregon Care Partners Conference Presentation for April 20, 2018.
- **Objective 2.2 (Achieved):** Conduct three (3) trainings with Adult Foster Home (AFH) providers on abuse prevention in cooperation with provider associations.
 - **Strategy 2.2.1 (Achieved):** November 2017, reviewed APS reports involving AFH providers for prevalence of abuse type. Identified six types of prevalent abuse types that occurred from 2015 to 2017.
 - **Strategy 2.2.2 (Achieved):** November 2017, developed training for AFHs based on the six types of prevalent abuse and scheduled monthly trainings from January 2018 through

December 2018. Trainings will continue in 2019, based on 2017-2018 abuse trends.

Goal 3: Maximize use of Legal Aid services by referring priority cases.

- **Objective 3.1 (Achieved, did not get desired outcome):** NWSDS APS staff receives training one time per year from Legal Aid on services and service priorities.
 - **Strategy 3.1.1:** May 2018 met with Legal Aid Director to discuss the logistics of cross-training staff on Legal Aid's service priorities and processes and begin training of APS staff. On July 26, 2018, Legal Aid provided training to APS staff, which resulted in a better understanding on the referral process and resources of Legal Aid. Due to unavailability of Legal Aid staff, there were no follow up actions in regards to completing a gap analysis in legal services or creating a resource list of legal services.
- **Objective 3.2:** NWSDS conducts training one time per year at Legal Aid on APS processes and procedures.
 - **Strategy 3.2.1:** May 2018, met with Legal Aid Director to discuss the logistics of cross-training and begin training of Legal Aid staff. Reviewed Area Plan goals and objectives to strategize an implementation plan. There was no follow up from Legal Aid staff after initial meeting.

Goal 4: Organize and conduct an event recognizing World Elder Abuse Awareness Day.

- **Objective 4.1:** Plan and organize one conference for World Elder Abuse Awareness Day. Timeframe for this event has moved a year. A new goal to hold an event in 2020 has been set; in 2018 staff identified the Salem Convention Center as the ideal venue, and connected with three speakers. In 2019, an event committee will be created to plan logistics.

- **Strategy 4.1.1:** By August 2019, research location, arrange presenters, create agenda and begin marketing the World Elder Abuse Awareness Day.
- **Strategy 4.1.2:** On June 2020, hold a World Elder Abuse Awareness Day event.

C-1.6 Older Native Americans

Within the five counties that NWSDS serves, there are two Native American Tribes; The Confederated Tribes of Siletz Indians and The Confederated Tribes of Grand Ronde. NWSDS staff have conducted presentations with staff from both tribes for the purpose of information sharing and to further discuss additional areas for potential collaboration.

Additionally, NWSDS staff participate in community partner groups that include representatives from the Grand Ronde and/or the Siletz Tribe. Those include the following; monthly West Valley Service Integration Team meetings, the Native Caring Conference planning committee and the State Independent Living Council. These face-to-face opportunities have allowed for greater information sharing between the tribes and NWSDS about activities and programs that each entity delivers. This has included sharing written outreach materials on specific programs and information about upcoming training opportunities for caregivers.

We anticipate building on these initial relationships and intend to pursue the following in addition to what activities are noted on the accompanying work plan; explore sponsoring a leader training for the Chronic Disease Self- Management Program (CDSMP) with The Confederated Tribes of Siletz Indians and developing a workflow process with both tribes whereby information about events and current training opportunities go between NWSDS and the two tribes on a regular basis. Additionally, in February 2018, we co-sponsored a series of Chronic Disease Self- Management classes with the Grand Ronde tribe. Classes were facilitated by one tribal member and one independent contractor

Goals, Objectives, Strategies

Goal 1: Increase use of the Aging and Disability Resource Connection (ADRC) of Oregon Resource Directory for the benefit of Older Native Americans.

- **Objective 1.1 (Achieved):** Ensure that staff from The Confederated Tribe of Siletz Indians are familiar with and utilize the ADRC of Oregon Resource Directory.
 - **Strategy 1.1.1 (Achieved):** Prior to January 2017, presented the resource directory to tribal staff and illustrated use and potential benefits. Solicited feedback from tribal staff on entries into the directory that they identified should be added and/or revised.
 - **Strategy 1.1.2 (Achieved):** February 2018, reached out to new local contact to work on adding/revising resource directory, given that recommendations from local tribal staff were not received when solicited in 2017. Main entry is currently overseen by another Area Agency on Aging (AAA).

Goal 2: Provide dementia education to tribal staff and members.

- **Objective 2.1 (Achieved):** Co-sponsor a community education event on the topic of dementia with the Confederated Tribes of Grand Ronde in 2017.
 - **Strategy 2.1.1 (Achieved):** April 2017, conferred with the Confederated Tribes of Grand Ronde on date/venue of community event, content of training with tribal contact and speaker.
 - **Strategy 2.1.2 (Achieved):** June 2017 and ongoing, finalized outreach materials and marketing plan for the event in collaboration with the tribal representative. On January 18, 2018, NWSDS in partnership with the Confederated Tribes of Grand Ronde, held the dementia education training event for

tribal members and others in the community, which featured speaker Joyce Beedle. The event had an attendance of over 50 people. Additionally, in September 2017, a presentation on NWSDS programs and services was given to 57 tribal elders at the Confederated Tribes of Grand Ronde.

D-1 Administration of Oregon Project Independence (OPI)

In an effort to maximize OPI services to consumers and utilize available funding resources in FY 13-15, NWSDS added new consumers to the OPI program until May 2015 when the program was closed to new intakes and a waitlist was initiated. NWSDS started the 2015-2017 biennium with 428 consumers receiving OPI services and a biennial funding allocation of \$2,722,706 (a reduction of \$278,245 from the FY 13-15 allocation of \$3,000,951). As of June 30, 2016, the end of the first year of the 2015-2017 biennium, NWSDS had 266 consumers receiving OPI services. As of February 2018, NWSDS had a list of over 300 individuals who were waiting for the program to re-open, evidencing the high level of need for the program. As done in the past, starting February 2018, calls to all individuals on the waitlist were started to inquire if individuals improved, remained the same, or declined and wanted to be screened for other programs and services. The Agency went through its waitlist of more than 300 individuals. A validated risk assessment tool was administered to all individuals who requested to be placed on to the waitlist. The tool provided a score indicating each individual's level of risk. Once all individuals on the wait list were contacted by risk level (high to low) to see if they were still in need of the OPI program, NWSDS openly shared the program was open to new intakes.

At the end of the first year of the biennium (June 30, 2016) NWSDS expended 65% of its biennial allocation for OPI after moving \$120,000 in OPI home-delivered meal expenses to Older Americans Act funding and reducing administrative costs to 6% from the 10% allowed. This means that

NWSDS began FY 16-17 (July 1 2016-June 30, 2017) with 35% of its biennial allocation instead of the typical 50%.

a. Delineate how the agency will ensure timely response to inquiries for service. Include specific time frames for determination of OPI benefits.

When a request for OPI benefits is received, an Aging and Disability Resource Connection (ADRC) Specialist will create a screening in OR ACCESS indicating the benefits/services the consumer is requesting and assign the screening to the appropriate Case Manager. The Case Manager will contact the consumer the same day or next business day, but no later than three business days. The Case Manager will offer an appointment to the consumer within 14 business days for an in-home assessment, unless a shorter timeframe is indicated. At the completion of the in-home assessment, a determination for OPI benefits is made.

If OPI is closed to new intakes and a waitlist is being maintained, the ADRC Specialist will complete a call module and ask the consumer if they are willing to complete an OPI Risk Assessment. The Risk Assessment and the wait list is maintained in the ADRC database. The waitlist is applicable to consumers who are new applicants, consumers who have been closed from the OPI program for any reason and wish to reapply and all OPI consumers who move to the NWSDS service area from a county not served by NWSDS.

b. Describe how consumers will receive initial and ongoing periodic screening for other community services, including Medicaid.

NWSDS administers both Medicaid and non-Medicaid community services and as such all direct service staff are cross trained in all services regardless of funding source. When consumers initially contact NWSDS they are provided the services of an ADRC Specialist, who are certified Information and Referral professionals.

The OPI program is designed to assist consumers to remain in their own homes. Often, OPI funded services augment other support systems the consumer may have available personally or from the community. Due to limitations of OPI funding and scope, the Case Manager explains all available options in addition to OPI.

Case Managers perform an annual reassessment conducted in the home of the consumer. The consumer has the contact information for the Case Manager and if communication indicates a change in the consumer's condition, the consumer may be reassessed earlier. The new internal database "TASC" is available for managers to view and monitor their cases and services provided, which will prompt them to initiate contact with the consumer if the services are not being used.

c. Specifically explain how eligibility will be determined and by whom.

Case Managers may authorize OPI funded services to consumers that demonstrate a need for assistance and score a Service Priority Level 17 or below on the DHS/APD CAPS assessment tool. The consumer must be age 60 or older or under 60 and diagnosed as having Alzheimer's disease or a related disorder. The consumer may not be receiving financial assistance or Medicaid, except SNAP and Qualified Medicare Beneficiary or Supplemental Low Income Medicare Beneficiary Programs. Consumers are screened to determine whether their needs can be met through other resources; every effort is made to assist consumers in using other resources before authorizing OPI. However, a consumer will not be denied access to OPI based on a refusal to utilize other resources. Eligibility for OPI does not transfer between Area Agencies on Aging.

d. Plainly state and illustrate how services will be provided.

Based on assessed need and in collaboration with the consumer, the Case Manager will develop a Service Plan that may include the following services:

- Homecare or other IADL/self-management tasks;

- Personal care or other ADL tasks;
- Adult Day Services;
- Home-delivered meals;
- Assistive Technology (requires management authorization);
- Chore Services (requires management authorization).

A maximum of 9 hours every 14 days of either homecare hours, personal care hours, or a combination of both can be authorized. The total combined can't exceed 18 hours every 28 days. The actual number of homecare hours or personal care hours up to the maximum will be based on identified need and living situations. Consumers have a choice to have home care and personal care services provided through a licensed in-home care agency that has a contract with NWSDS, or through a Home Care Worker in good standing with the Oregon Home Care Commission. Adult Day Services are available from an Adult Day Service Program that has a contract with NWSDS and is limited to one-day per week in addition to the authorized home and personal care hours. Assistive Technology and Chore Services are provided through existing vendor contracts with NWSDS or depending on cost, purchased through a local vendor after obtaining at least three quotes.

e. Describe the agency policy for prioritizing OPI service delivery for both the waiting list and hours/types of services for the individual.

Consumers receiving OPI services will have services prioritized in the following order:

1. Personal care or other ADL tasks;
2. Home-delivered meals;
3. Homecare or other IADL/self-management tasks;
4. Assistive Technology (requires management authorization);
5. Chore Services (requires management authorization);
6. Adult Day Services.

Consumers on the OPI waitlist will be prioritized for services based on the Risk Assessment Score and length of time on the waitlist. This means the

waitlist will first be sorted by the Risk Assessment Score and then by the length of time the consumer has been on the waitlist.

f. Describe the agency policy for denial, reduction or termination of services, and, if the AAA is terminating services, illustrate how the goals of OAR 411-032-0001 are being accomplished.

Attrition will be the first approach used to make reductions to existing OPI caseloads. Staff will review all existing OPI cases and identify consumers who can be considered for possible service reduction/termination, can be served through other resources, and/or transitioned to the Medicaid program. Case managers will make home visits to those consumers to evaluate the current service plan and discuss voluntary reduction in services with the consumer and/or representative. To meet additional OPI funding reductions, NWSDS will adjust the Priority Level for authorizing OPI-funded services.

If a consumer has services terminated, the consumer will be referred to a NWSDS Options Counselor to develop an action plan using natural and community supports to meet the goals of OAR 411-032-0001.

g. Specify how the agency informs consumers of their right to grieve adverse eligibility and/or service determination decisions and how the agency handles consumer complaints.

If a new OPI applicant is denied eligibility, or an existing consumer's service plan is reduced or terminated, the case manager will review the denial or reduction or closure of services with the consumer. The case manager will send the consumer a notice of Service Changes/Denial which includes Other Service Availability and a Notice of Right to Grievance Review fourteen (14) days prior to the reduction/termination of services. Copies of the notices will be directed to the program manager.

The consumer will have ten (10) calendar days from the date of the notice to grieve the decision.

Consumer complaints are taken seriously and addressed through the program manager and Area Program Manager. The agency also has available Consumer Comment Form, which are available to all persons dealing with the agency.

h. State the cost of authorized service per unit and explain how fees for services will be implemented, billed, collected and utilized.

Home Care	Agency = \$20.95/hr.; HCW = \$18.57/hr.
Personal Care	Agency = \$20.95/hr.; HCW = \$18.57/hr.
Adult Day Services (Salem)	Center 50+ = \$8.00/hr.
Home-delivered meals	Contracted rates ranging from \$6.75/meal to the Medicaid rate of \$9.54.
Assistive Technology	Determined on a case by case basis
Chore	Determined on a case by case basis

Utilizing the fee scheduled published by the State of Oregon’s Department of Human services, fees are assessed on Home Care and Personal Care services only. Consumers are provided with a fee determination form showing the calculation of the fee and the maximum amount they could expect each month.

NWSDS fiscal staff send monthly statements to OPI consumers who utilize the services of a Homecare Worker (HCW). Consumers who use the services of a contracted in-home care agency are billed by the in-home care agency and per the contract, the agency remits the fees collected to NWSDS. The fees are credited to a dedicated OPI Program Income account within the

NWSDS accounting system and can only be used to support the OPI program.

i. Describe the agency policy for addressing consumer non-payment of fees, including when exceptions will be made for repayment and when fees will be waived.

Case managers explain at the time the consumer is enrolled in the program that OPI is a fee-based program and the importance of the program income to sustain the services. If a consumer does not pay, fiscal staff inform the case manager who follows up to understand the reason for non-payment. If the consumer has had a change in their financial situation, the case manager will recommend reducing or waiving the fee to their program manager. However, regardless of the reason, non-payment of fees is not a basis for service termination.

j. Delineate how service providers are monitored and evaluated.

During the first year of each biennium, the contracted service providers are asked to complete a self-assessment instrument that is validated with an onsite visit by NWSDS staff.

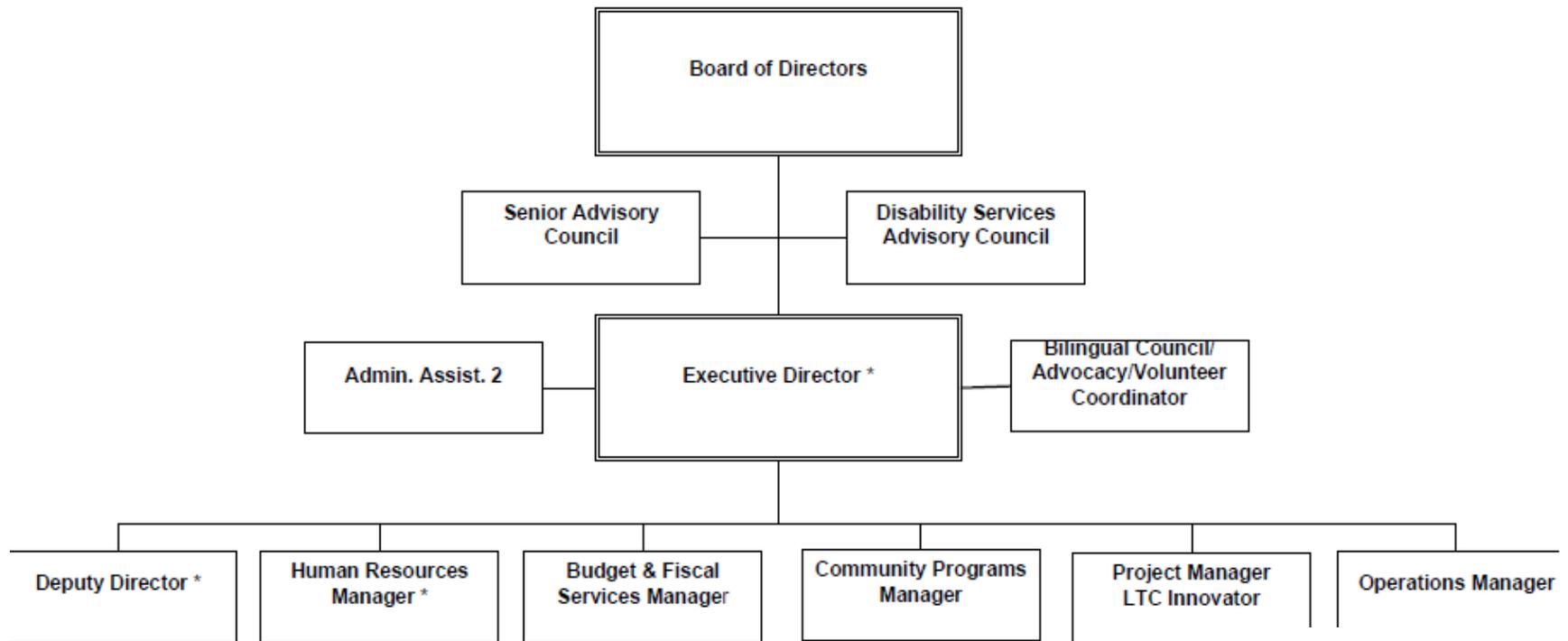
D-2 Services provided to OAA and/or OPI consumers: See Appendix J

Section E
Area Plan Budget

[See Accompanying Document]

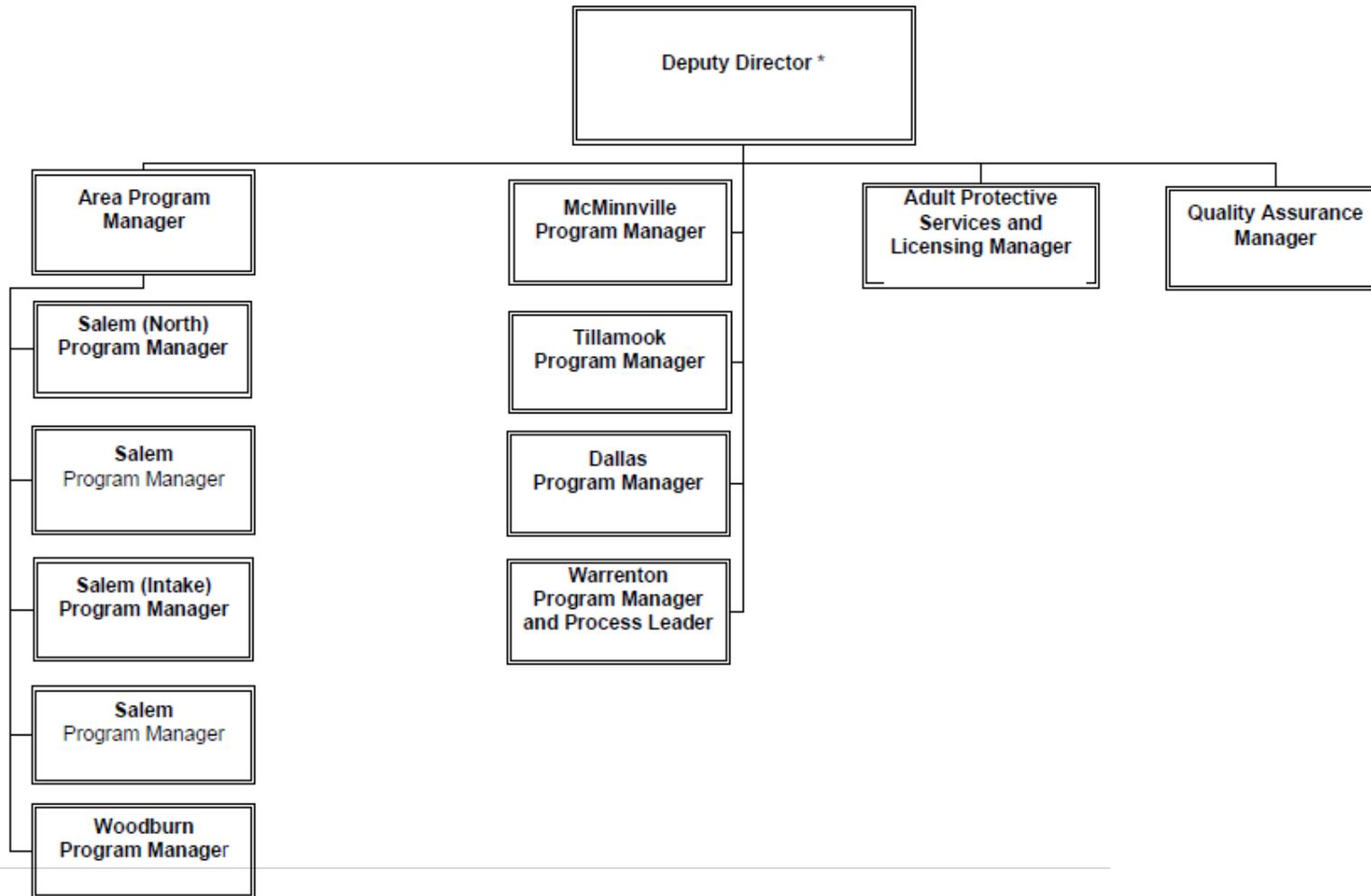


NORTHWEST SENIOR & DISABILITY SERVICES



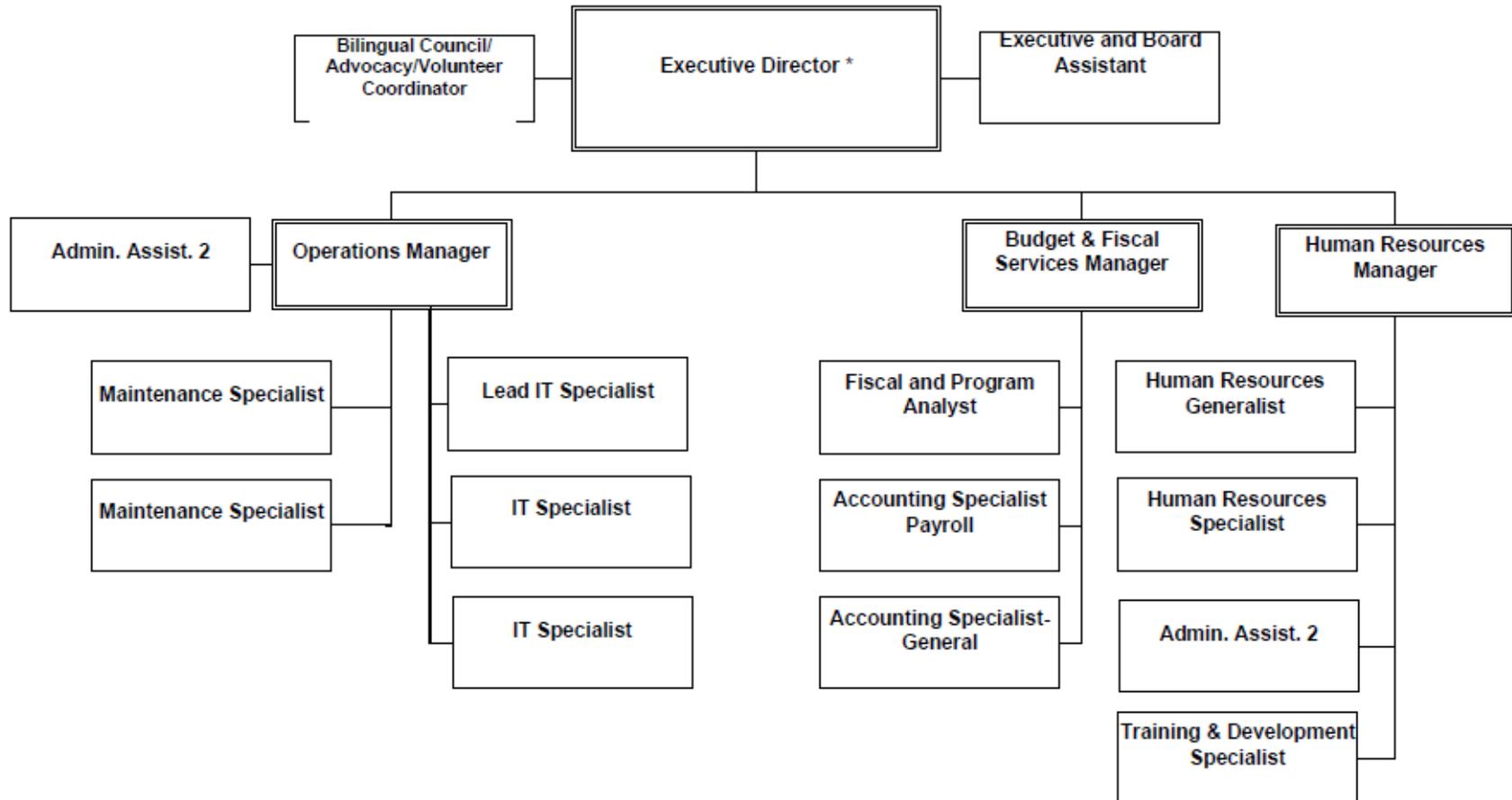


NWSDS SERVICE PROGRAMS



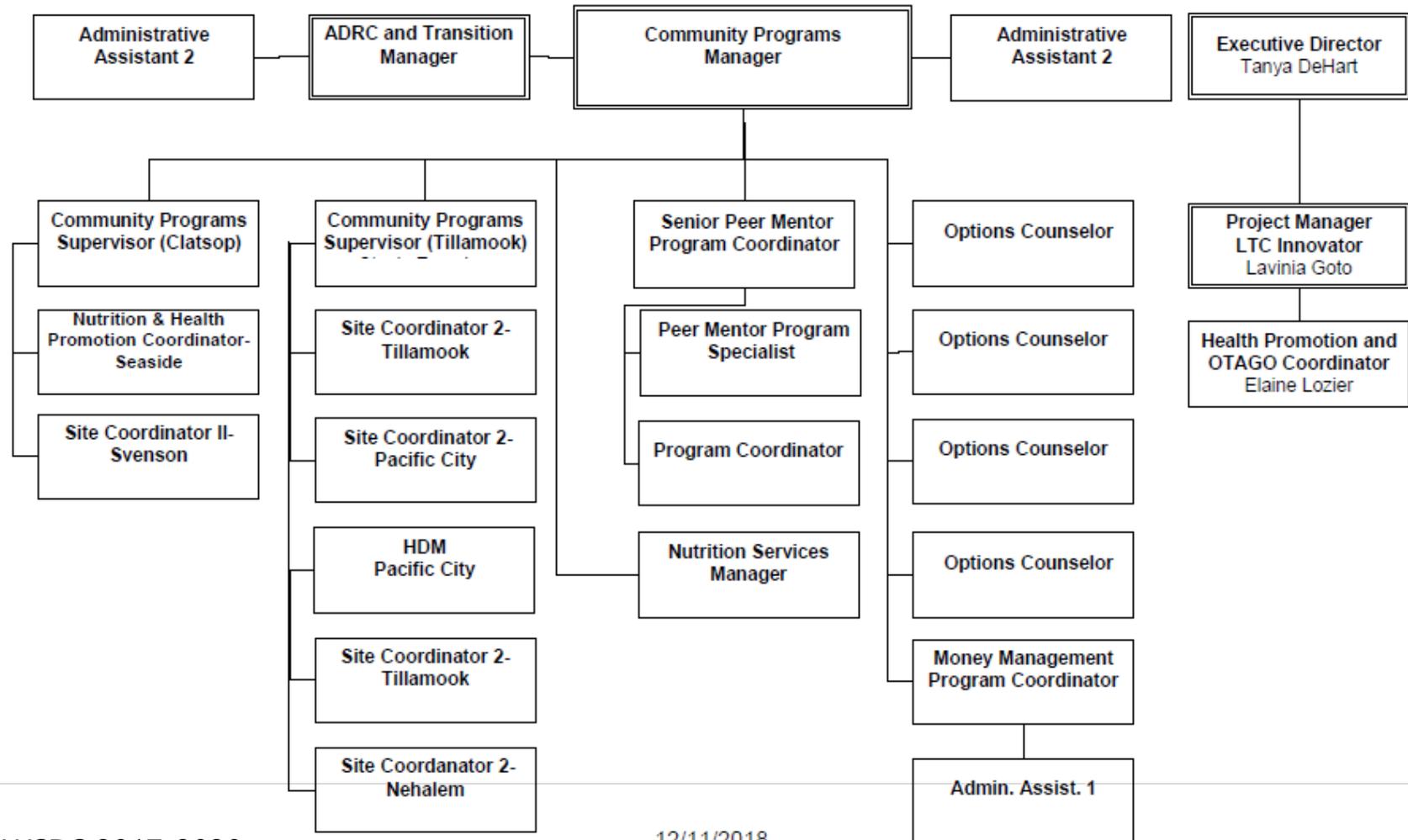


NWSDS ADMINISTRATION



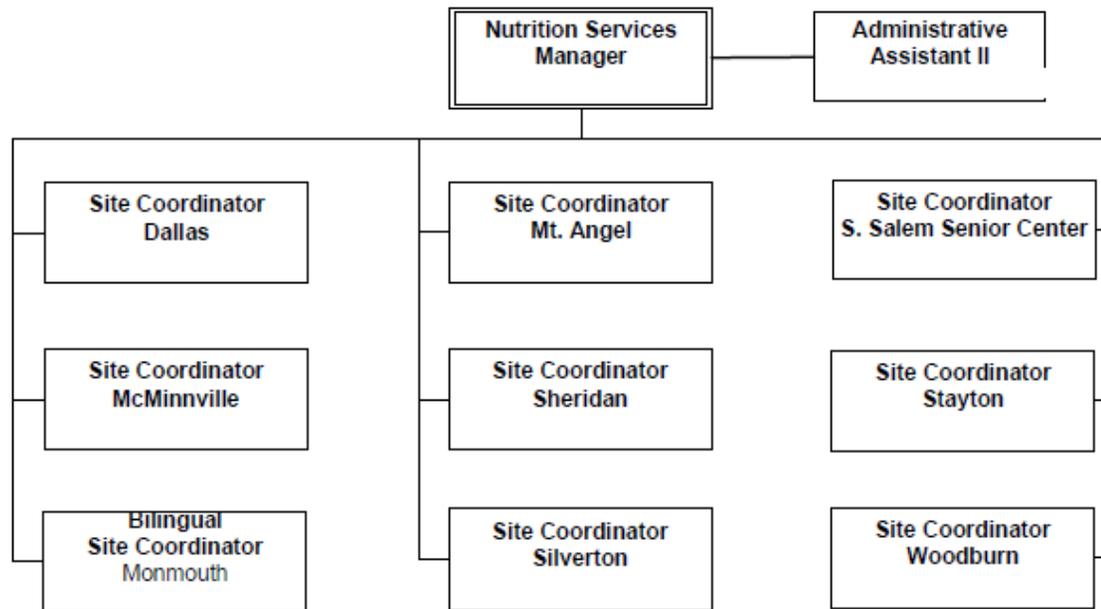


NWSDS COMMUNITY PROGRAMS UNIT



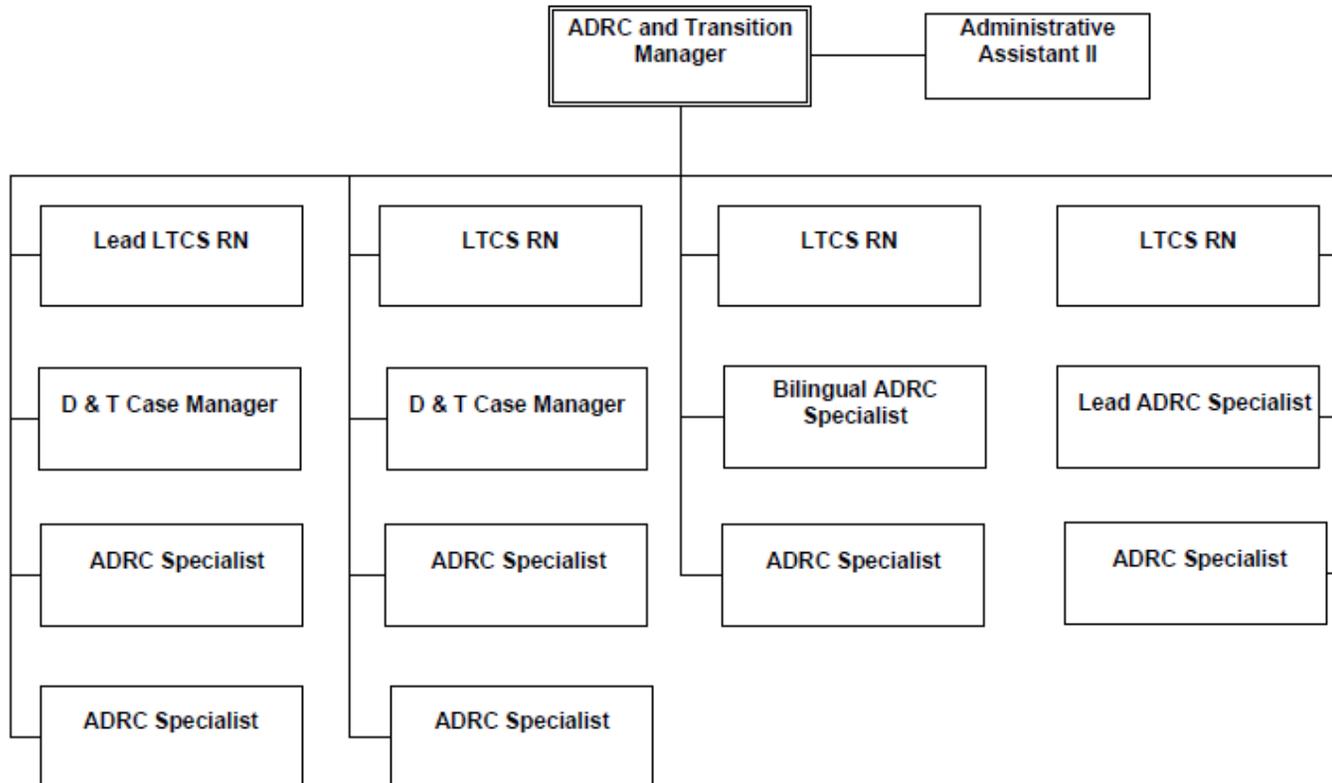


NWSDS COMMUNITY PROGRAMS NUTRITION SERVICES UNIT



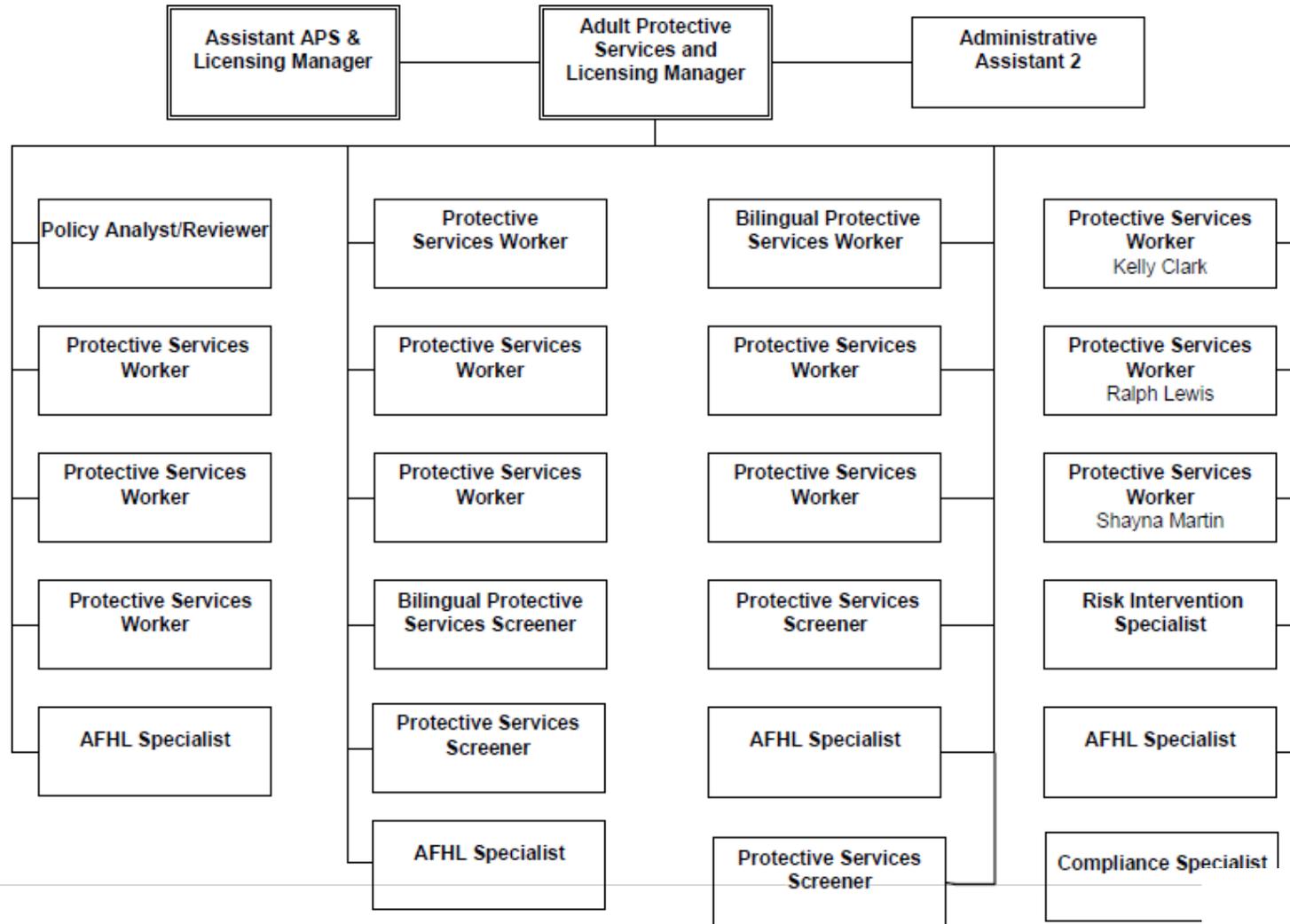


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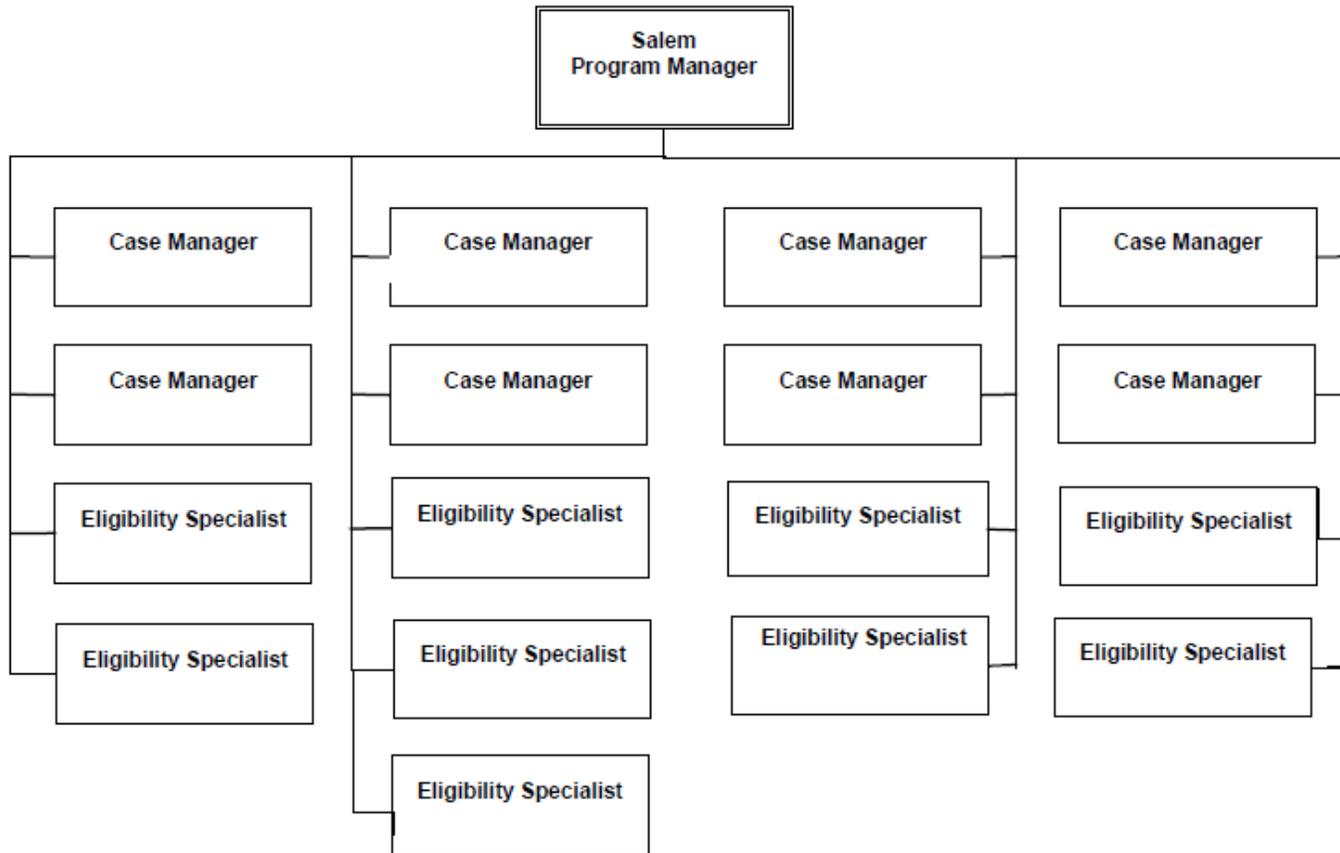


NWSDS ADULT PROTECTIVE SERVICES & LICENSING UNIT



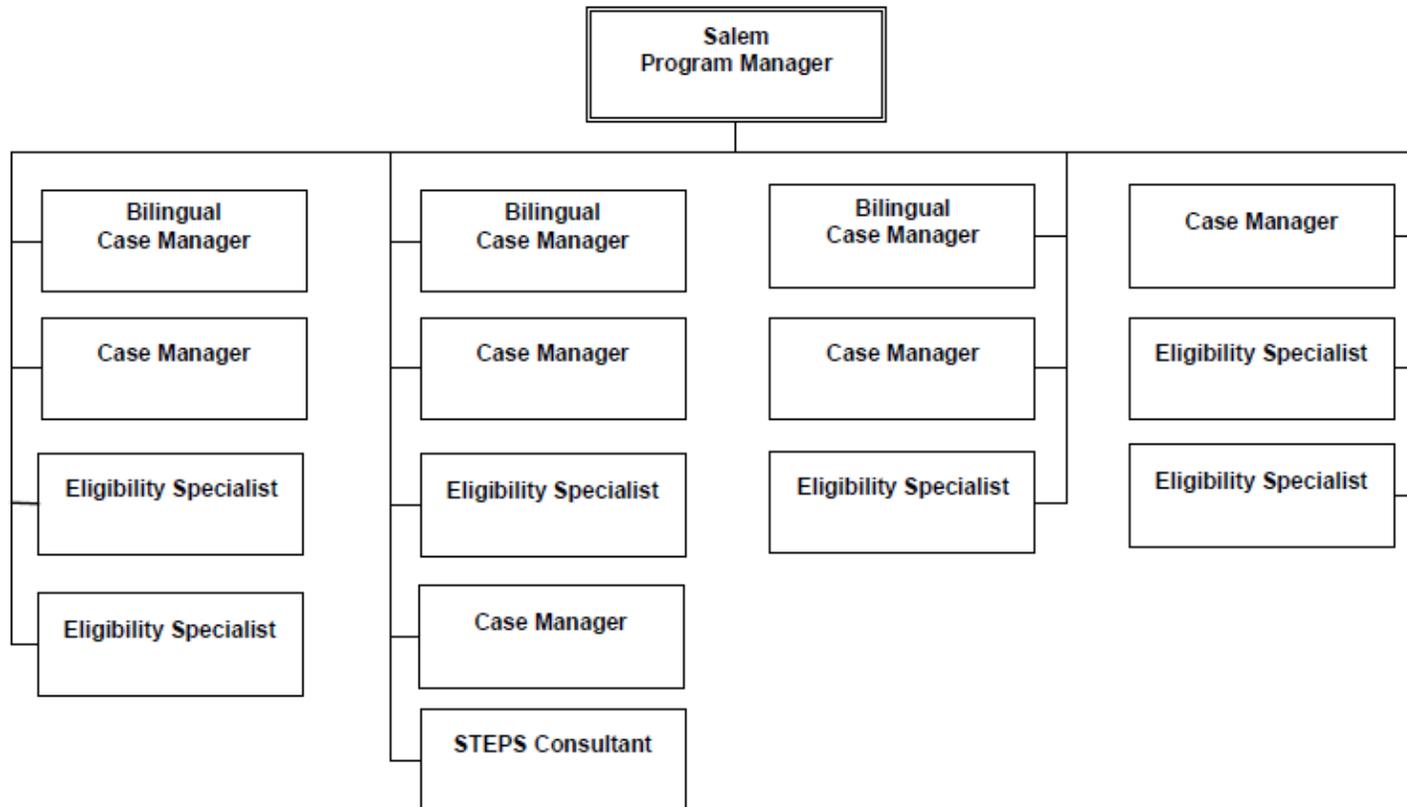


NWSDS SALEM INTAKE UNIT



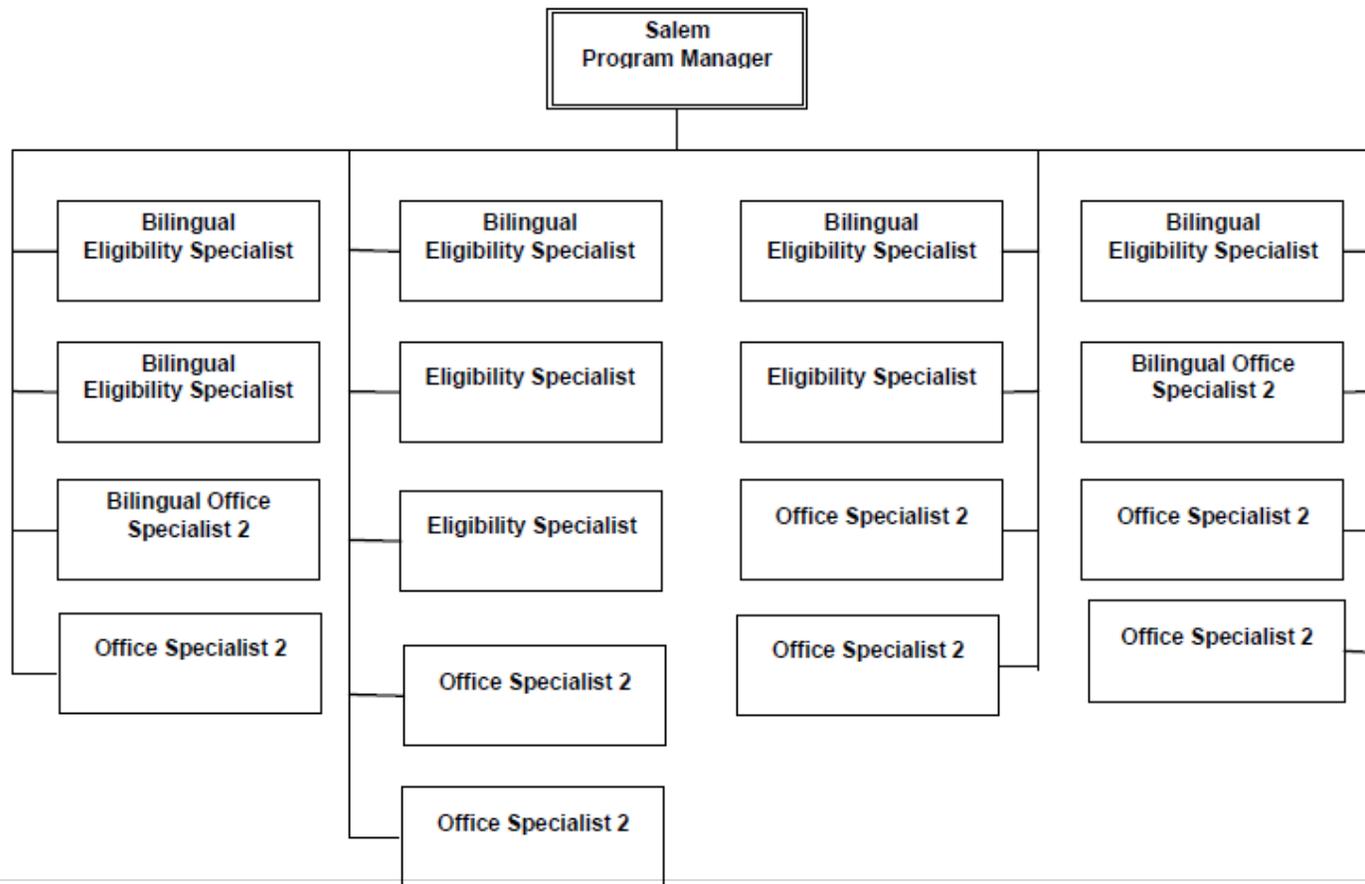


NWSDS SALEM NORTHSIDE ONGOING UNIT



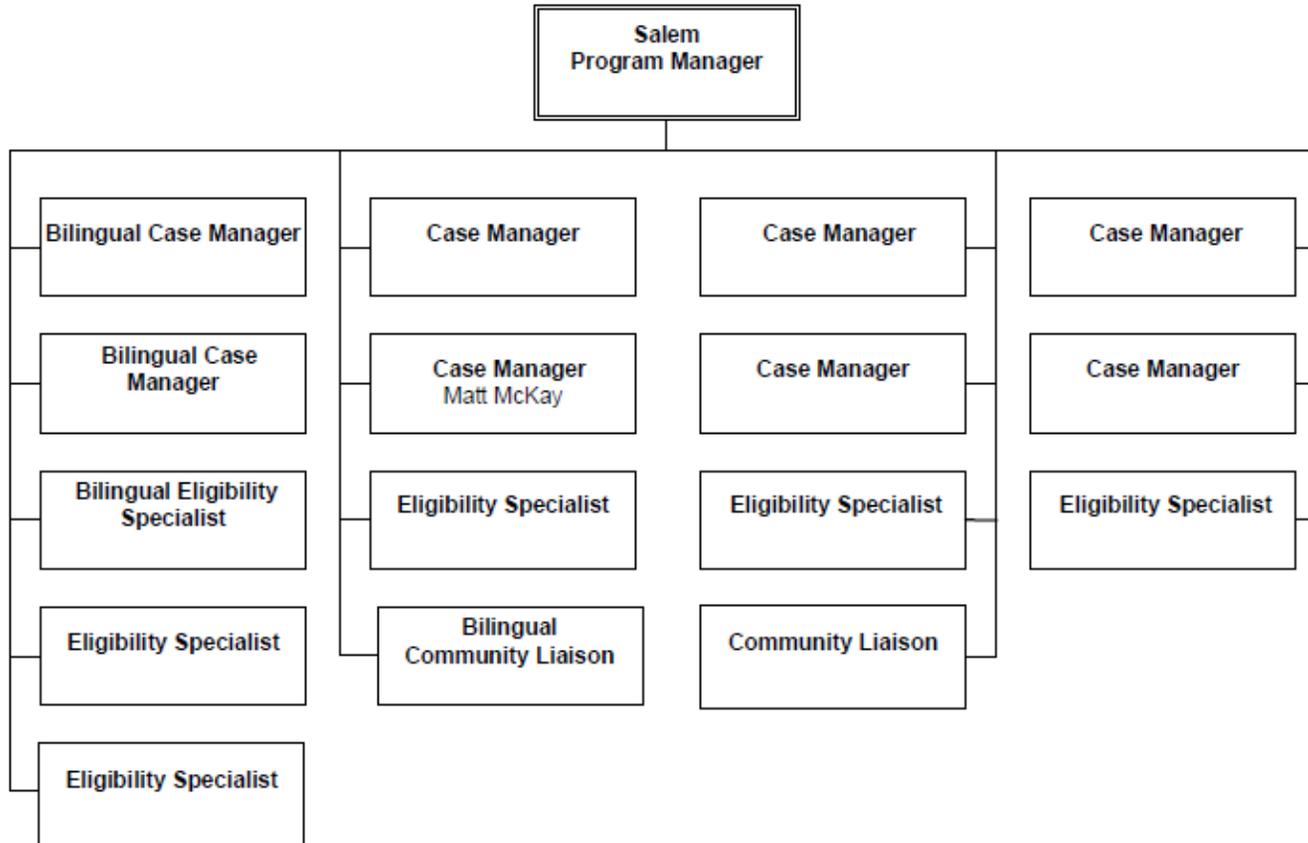


NWSDS SALEM SERVICE UNIT



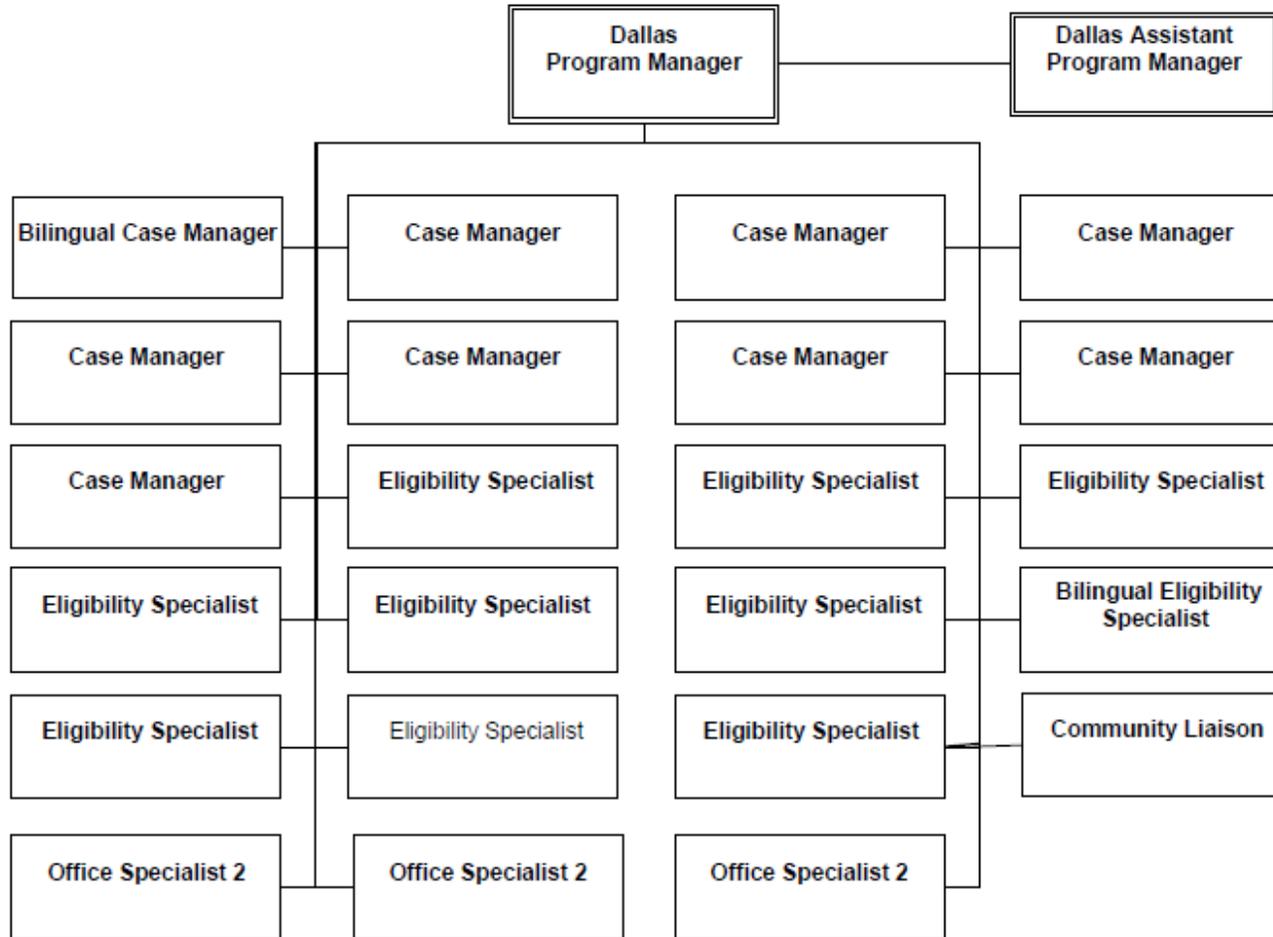


NWSDS SALEM SOUTHSIDE ONGOING UNIT



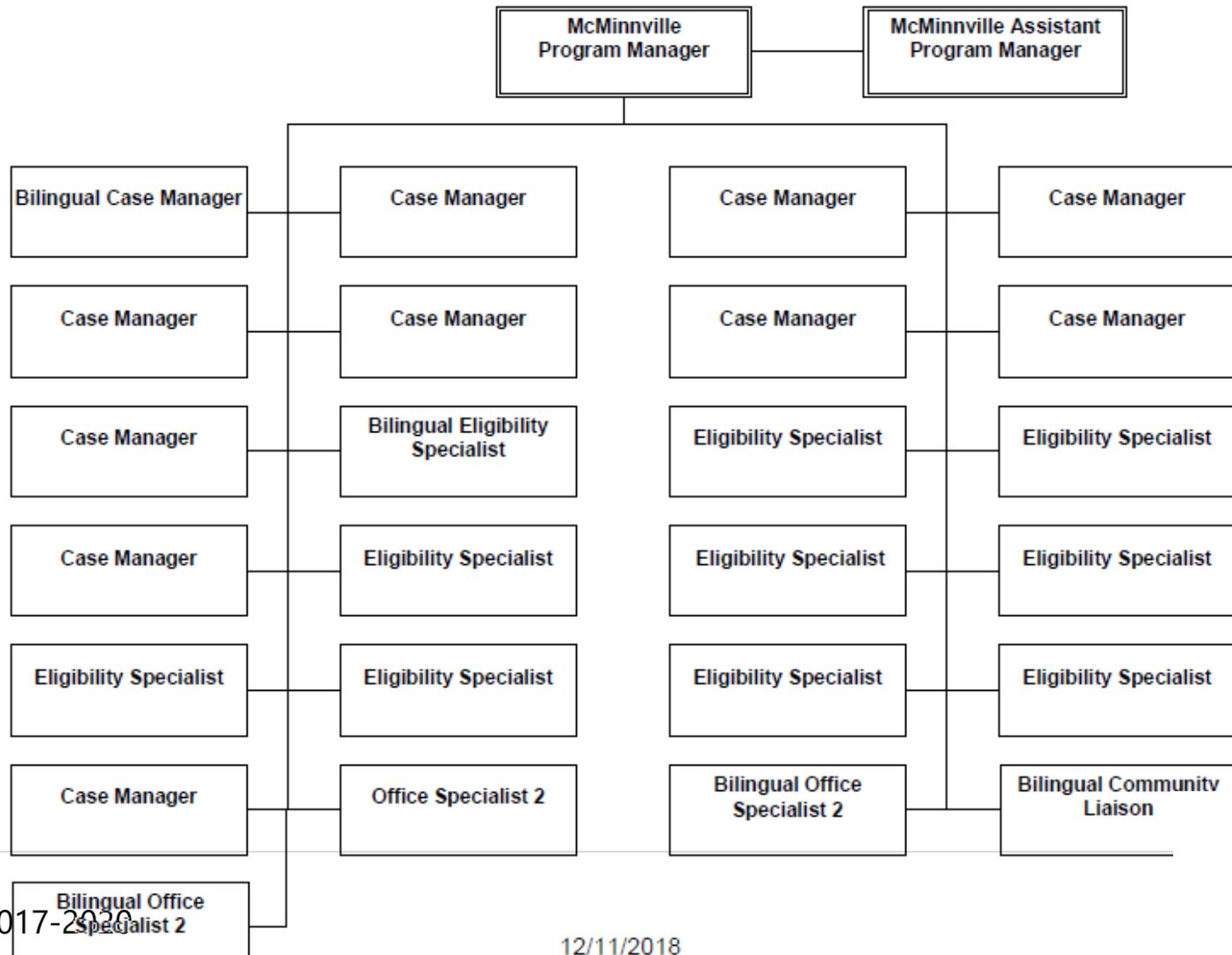


NWSDS DALLAS PROGRAM



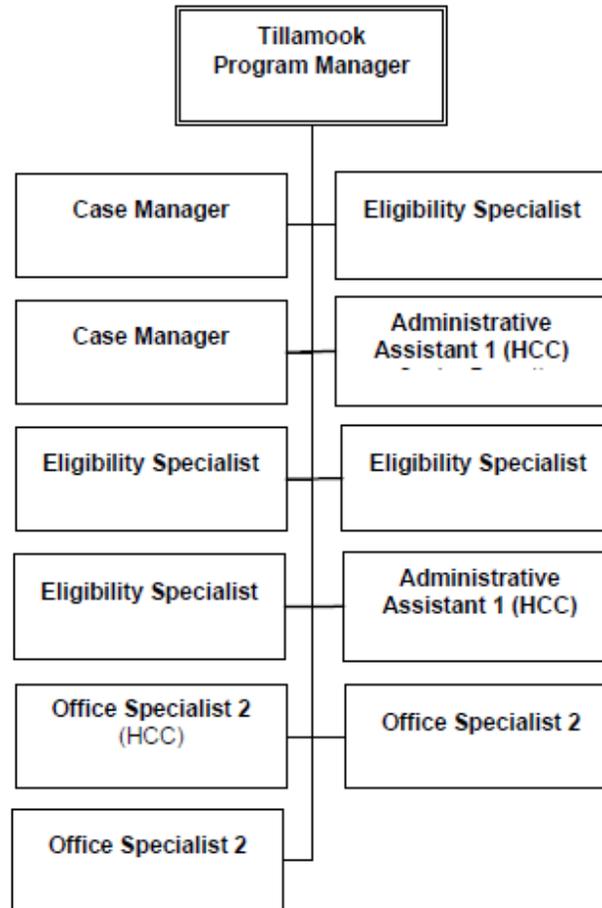


NWSDS McMinnville Program





NWSDS TILLAMOOK PROGRAM



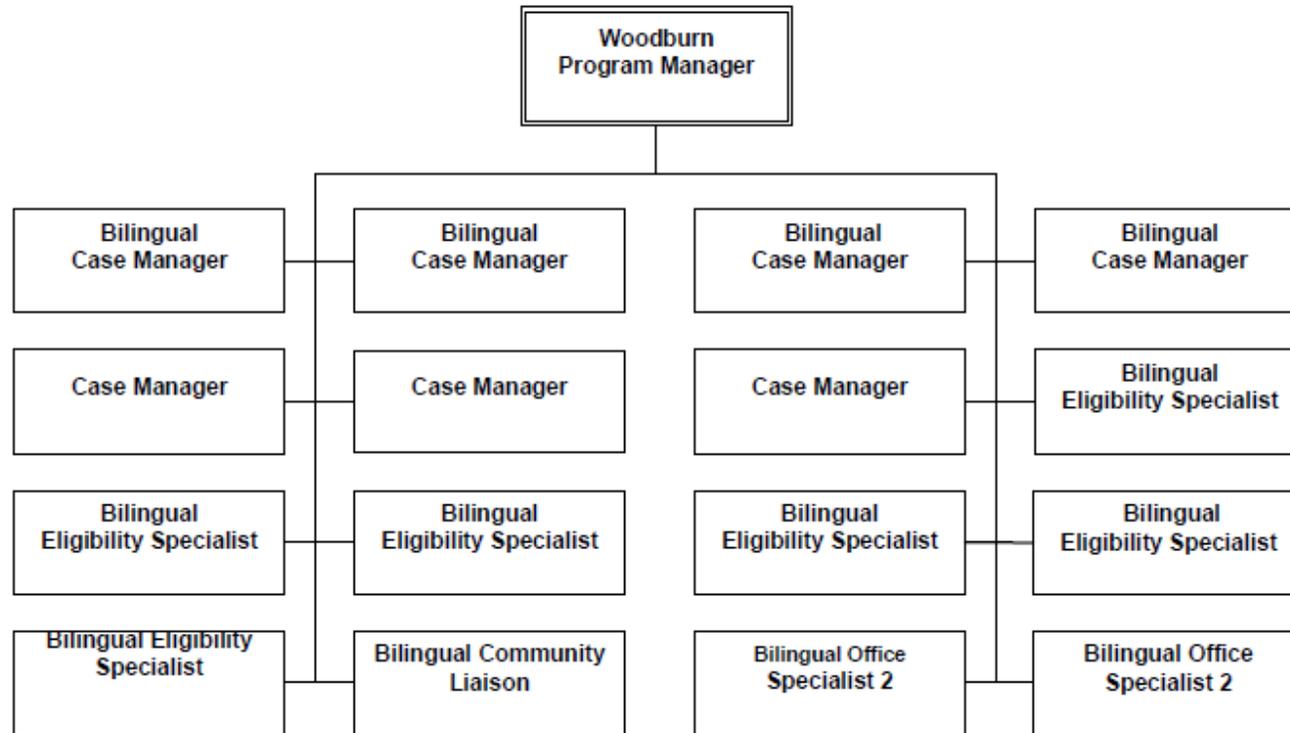


NWSDS WARRENTON PROGRAM





NWSDS WOODBURN PROGRAM



Appendix B

NWSDS Senior Advisory Council:

NAME & CONTACT INFORMATION	REPRESENTING	TERM EXPIRES June 30:
Amador Aguilar	Marion County – B, H	2020
Patrick Brodigan	Marion County – D	2020
Linda Crandell	Clatsop County – A, C, H	2019
Ed Cavin	Marion County – A, E, H	2020
Carol Hankins	Yamhill County – A, C, H	2020
Reed Hedlund	Yamhill County – D, C	2019
Ruth McEwen	Marion County – A, H	2020
John Newman	Marion County – A, E, H	2020
Angela Plowhead	Marion County – B, D, E, H	2020
Charles Richards	Marion County – A, E, H	2020
Betty Sledge	Polk County – A, C, D	2019
Rebekah Smith	Marion County – D	2019
Shirl Staats	Polk County – A, C, H	2019
Heather Wechter	Marion County – A, C, H	2019
Sue Zerangue	Clatsop County – A, C, H	2019

<u>Categories of Representation:</u>	<u>Total</u>
A = Age 60+	10
B = Minority	2
C = Rural	7
D = Service Provider	5
E = Veteran	4
F = Family Caregiver	0
G = Elected Official	0
H = General Public	11

NWSDS Disability Services Advisory Council:

NAME & CONTACT INFORMATION	REPRESENTING	TERM EXPIRES June 30:
Colin Brown	Marion County – C, D, H	2019
Donna Davis	At-large – A, B, C, H	2019
Kathy Eckert-Mason	– A, D	2019
Bill Kluting Bill Kluting	At-large – A, B, D	2020
Steven Manesis	At-large – A, C, E, H	2020
Ruth McEwen	Polk County – C, E, H	2020
John Newman	Clatsop County— A, C, D, H	2020
Judith Richards	Marion County – A, H	2019
Shirl Staats	At-large – A, E, H	2019
Heather Wechter	At-large – A, H	2019
Roxanne Wilson	Polk County –A, H At-large – A, C, H Yamhill – A, B, C, H	2020

<u>Categories of Representation:</u>	<u>Total</u>
A = Person with disability	10
B = Minority	2
C = Rural	6
D = Service Provider	3
E = Veteran	2
F = Family Caregiver	0
G = Elected Official	0
H = General Public	10

NWSDS Governing Body:

NAME & CONTACT INFORMATION	REPRESENTING	DATE TERM EXPIRES
Kathleen Sullivan Clatsop County Courthouse 800 Exchange Street, Suite 410 Astoria, OR 97103	Commissioner, Clatsop County Board Vice-Chair	January 2021
Sam Brentano Marion County Courthouse P.O. Box 14500 Salem, OR 97309	Commissioner, Marion County	January 2021
Craig Pope Polk County Courthouse 850 Main Street Dallas, OR 97338	Commissioner, Polk County	November, 2021
Bill Baertlein Tillamook County Courthouse 201 Laurel Avenue Tillamook, OR 97141	Commissioner, Tillamook County	December, 2020
Mary Starrett Yamhill County Courthouse 535 E. 5th Street McMinnville, OR 97128	Commissioner, Yamhill County Board Chair	January 2023

Appendix C – Planning Process

Area Plan Steering Committee Meetings: 4 Advisory Council members and 2 Executive Management staff. Meeting dates:

- January 5, 2016
- March 1, 2016
- May 3, 2016
- July 5, 2016
- September 6, 2016

Information and Assistance/ADRC Workgroup: 4 Advisory Council members, Independent Living Center Director, 2 Oregon Department of Veterans Administration staff, 1 State Unit on Aging staff, 2 NWSDS management staff. Meeting date:

- March 14, 2016

Nutrition Services Workgroup: 2 Advisory Council members, 3 meal site coordinators, 1 home-delivered meal volunteer, 2 Senior Center directors, 1 Food Bank manager, 2 NWSDS supervisors, 2 NWSDS Program managers. Meeting date:

- April 26, 2016

Health Promotion Workgroup: 2 Advisory Council member, 2 NWSDS supervisors, 1 CCO manager, 1 NWSDS Options Counselor, 1 Yakima Farmworker staff, 2 NWSDS program managers. Meeting date:

- March 30, 2016

Family Caregiver Workgroup: 4 currently enrolled consumers, 3 previously enrolled consumers, 1 Advisory Council member, 1 NWSDS Program Manager, 1 NWSDS Administrative Assistant. Meeting date:

- March 21, 2016

Elder Rights and Legal Services: 1 Advisory Council member, 1 Legal Aid staff, 1 Long-Term Care Ombudsman staff, 1 Protective Services Worker, 1 NWSDS Program Coordinator, 2 NWSDS Program Managers. Meeting date:

- March 30, 2016

Older Native American: 1 Advisory Council Member and NWSDS staff met with Grande Ronde staff in-person on March 22, 2016. NWSDS Program Manager met 1:1 and follow-up conference call with Siletz staff.

Focus Groups with Spanish-speaking older adults

- April 29, 2016 held in Independence, Oregon with 11 participants
- May 7, 2016 held in Salem, Oregon with 5 participants
- June 8, 2016 held in Woodburn, Oregon with 8 participants

Focus Group with Russian-speaking older adults

- May 4, 2016 held in Salem with 9 participants

Draft Plan Posted for Comment

- September 6-15, 2016 posted on the NWSDS Website for public comment.

Public Hearing/Approval Process

- Public Hearing Notice was published in the following:
 - ***Headlight Herald: Tillamook County***
 - ***Daily Astorian: Clatsop County***
 - ***Statesman Journal: Marion and Polk County***
 - ***New Register: Yamhill County***
- September 15, 2016 Public Hearing held in Salem by NWSDS Advisory Council, recommendation to Board of Directors for approval.
- September 22, 2016 Area Plan adopted by the NWSDS Board of Directors

Appendix D – Final Accomplishments from 2013-2016 Area Plan

Family Caregivers:

Goal: Strengthen the core elements of the FCSP to address the needs of caregiving families.

The core elements of the FCSP (access, information, respite, support groups and counseling services) have expanded in all 5 counties served by NWSDS now that we have full-time FCSP Specialists employed and located in all counties, including a bilingual English/Spanish Specialist in Polk County. All Specialists are active members of the Service Integration Teams in their county, which has significantly increased the outreach and networking opportunities for the program and the development of partnerships. All staff and several community partners are trained in Savvy Caregiver and the program is offered in all 5 counties. A focus on developing awareness with school district staff about the FCSP has increased referrals to the Grandparents raising Grandchildren services of the FCSP.

Information and Assistance/Aging and Disability Resource Connections (ADRC)

Goal: Continuously improve the quality of ADRC and I&A services and outcomes to consumers.

The ADRC is now continuously reviewed by the NWSDS Quality Assurance Unit (QA). This means the work of the ADRC staff in the areas of screenings, narration, assignments to case managers and other NWSDS service staff and accurate completion of the ADRC call module is routinely reviewed by QA staff. Trained volunteers completed a Secret Shopper survey of the ADRC, where they presented themselves to the ADRC via phone as a

consumer and then rated their experience with the ADRC staff. A Secret Shopper survey will be repeated on an ongoing basis.

A Lead ADRC specialist has been hired to provide an increased level of training and mentoring for ADRC staff in an effort to increase consistency and provide coaching that will lead to retention of staff.

The update and maintenance of the ADRC resource database is a high priority and a dedicated .5 FTE has been assigned to this work. It is also important to expand the resources in the databases, especially for people with disabilities. NWSDS contracted with Marion County Office of Intellectual and Developmental Disabilities to identify gaps in the resource database related to consumers with intellectual and developmental disabilities; the contracted staff added any missing resources after completing a gap analysis. This work was also completed with the contracted staff person from the Lane Independent Living Alliance (LILA) for resources for people with disabilities.

A great deal of effort was expended under the Gatekeeper Program to train community organizations and businesses about how to contact the ADRC to report suspected abuse or concerns about older adults they have encountered in their course of conducting business.

Elder Rights and Legal Assistance

Goal: Develop and support elder abuse prevention efforts and legal services developer; integrate elder rights into social services delivery system.

NWSDS launched an "Online Abuse Reporting Form" on its public facing website to make reporting more accessible to the community. A form can be downloaded, filled out and submitted via email directly to a NWSDS Adult Protective Services (APS) screener. A variety of outreach activities were implemented including the purchase of radio time in both English and

Spanish about how to recognize and report suspected abuse or neglect. The APS unit developed a curriculum to train all NWSDS staff on the basics of understanding abuse and how to report it. An APS screener who is bilingual English/Spanish has been hired to provide a better experience for Spanish-speaking consumers who call.

APS staff participate in multi-disciplinary teams in all 5 counties served by NWSDS to discuss complex cases and provide ongoing opportunities for networking and training. These teams typically have participation from local social service agencies, healthcare and law enforcement.

Self-assessments were completed with the contracted legal services developers to ensure legal assistance was targeted to the priority issues areas outlined in the Older Americans Act. Priority issues are: income and public benefits, housing, guardianship, long-term services and supports, health care, protection from abuse or neglect, utilities and age discrimination.

Health Promotion

Goal: Develop additional opportunities for greater participation in health and wellness activities.

The volume of health and wellness opportunities has increased by nearly 100% during the 4 year period of this plan, as well as the types of classes and interventions offered.

NWSDS now offers the entire suite of programs developed by Stanford University in both English and Spanish; chronic disease self-management as well as self-management of specific conditions such as cancer, chronic pain and diabetes. NWSDS has shown significant outcomes for consumers in its work with homebound older adults participating in the Otago fall prevention program. NWSDS continues to support other physical activity

classes proven to prevent fall incidents such as Tai Chi and the Arthritis Foundation exercise classes.

NWSDS conducted randomized trials to evidence that the Peer Mentoring program targeted to older adults with signs of depression and other mental health conditions had proven outcomes. This work elevated the Peer Mentoring program as having met the criteria of an evidence-based intervention with replicable outcomes.

Older Native Americans

Goal: Expand key partnerships within tribal communities.

NWSDS continues to meet with the Confederated Tribes of Grand Ronde and Siletz to identify areas of collaboration. NWSDS has collaborated with the tribes to educate tribal members about Medicare benefits and use of the ADRC resource database. NWSDS staff participated on the planning committee for the annual Native Caring Conference for family caregivers.

Nutrition Services

Goal: Reduce nutritional risk and food insecurity and improve participant's quality of life by providing meals, supportive services and social interactions.

The NWSDS Nutrition Services program has spent considerable time with key community partners to understand why the congregate meal program is under-utilized. As such, the program has initiated a meal certificate program in the Salem-Keizer area, partnered with one site to offer a fresh soup and salad bar as an alternative to the typical hot meal and has issued a Request for Proposal (RFP) for a community-based service delivery model in the coastal counties.

The program also made changes in its service delivery model to bring the program expenses back in line with revenue while maintaining services consumers receiving home-delivered meals.

Appendix E

NorthWest Senior

And

Disability Services

**Emergency
Preparedness
Plan**

As of August 9, 2016

Emergency Preparation
And
Continuous Process Improvement

Every preparedness plan is a work-in-progress. A major tenet of emergency preparedness is to learn from every event and use that knowledge to develop a more effective response in the future events. Feedback on our plan is critical so we can also learn from experience. We would like to know what worked well, what didn't, what is missing, and what doesn't make sense.

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Applicable to All Situations

Guiding Principles

- Every incident will be different, both in severity and in length of impact. The response needs to be flexible and meet the needs of the incident.
- Safety of staff is the first goal. Every task should be evaluated for safety.
- Efforts should be taken to mitigate damage to property.
- Responses should be in conjunction with local emergency authorities and/or Oregon State Emergency Operations Center.
- Lines of authority should be clear to all.
- Communication is vital. Keep local and state partners and authorities informed.
- Documentation of the event and all steps taken, decisions made, and funds expended are very important. You may want to designate someone to track expenditures.
- Every event is stressful on all, including staff. People's emotional health should be supported. If the response to the event is likely to last more than a couple of days, plans should be made to rotate staff (including leadership) to allow for periods of rest.
- Plan ahead. If there is a chance that needed tasks cannot be done with current resources, contact local partners and the state early. If rules or contract provisions may need waiver, contact the state. If the event is severe or long enough, it is important to designate staff to plan ahead while others manage the current situation.
- Set up a regular briefing at the beginning and end of each day (or at shift change) to keep everyone informed of the status of the situation, actions being taken and anticipated actions needed soon.

Assessment of Potential Hazards

The possibility of potential hazards will vary across our diverse geographical planning and service area. Primary risks will be identified between valley and coast offices.

Valley:

- Primary potential hazard for the valley area is severe weather:
 - Ice storms in the winter;
 - Rain causing localized flooding; and
 - High winds.
- Additional hazards include threat of earthquake and forest fires.

Coast:

- Greatest threat is tsunami.
- Other hazards:
 - Severe weather including occasional ice, wind, rain/flooding and forest fire.

Triggers to Activation of the Plan

This plan will be activated if any of the following occur. This could be caused by weather or other natural event, a man-made event or a pandemic. The extent of activation will be decided by the Incident Commander.

- The county emergency manager requests activation or the participation of an office in response to an event.
- An office is unable to complete any of its mission critical duties for 2 business days. This could be caused by power, phone, or computer outages or staff shortage.
- An office must be evacuated or is otherwise unusable for more than a couple of hours or entails significant damage to its structure.

- An event causes or probably will cause an evacuation of a significant number of either consumers or vulnerable citizens. (This will be determined by the person with the authority to activate the plan.)
- An event causes or probably will cause either significant damage or put at risk the health and safety of a significant number of either consumers or vulnerable citizens. (This will be determined by the person with the authority to activate the plan.)
- Any other event that management or the most senior person available decides warrants activation of this plan.

Activation Authority

The following members of the NWSDS Executive Management Team (EMT) have the authority to activate the plan. This list of EMT members will be worked in the order given below and the activation decision will fall to the 1st person that is available:

- Tanya DeHart
 - Tanya.dehart@nwsds.org
 - 503-304-3655 (work)
 - 503-302-4758 (cell)
- Eugene Plukchi
 - Eugene.Plukchi@nwsds.org
 - 503-304-3484 (work)
 - 503-851-5027 (cell)
- Charlene Gibb
 - Charlene.Gibb@nwsds.org
 - 503-304-3401 (work)

If contact with the EMT is not possible, activation of the plan will fall to the Program Managers in locally affected offices

Activation Notifications

The person activating the plan will determine how many and who will be notified.

If activation is initiated by a member of NWSDS Executive Management Team (EMT), notification to Unit Offices and Agency Staff will be determined by the scope and nature of the emergency.

- 1) If the emergency is widespread (ex.: earthquake) EMT will notify all Unit Managers. Unit Managers will be responsible for staff notification (message on local office phone OR calling staff using an emergency phone tree).
- 2) If the emergency is localized (ex; weather related such as winter storm or flooding), EMT will only notify Unit Managers in the affected area(s). Unit Managers will be responsible for staff notification (message on local office phone OR calling staff using an emergency phone tree).

If EMT is not available to make the decision to activate the plan, the decision will fall to Unit Managers either individually or as a group. Scope of notification will be determined as described in items 1 & 2 listed above.

Communication Plan

All NWSDS Offices will develop a working relationship with local emergency management (EM), so that when the system is activated, communication occurs regularly both to and from the NWSDS office and EM. They are our best and maybe only source of immediate assistance in significant events.

Staff Call-In Procedure

In an emergency event, all staff will attempt to call their home office. There will be a recorded message with instructions for staff, as long as the office phone system is operational. If the office phone system is operational all

staff should leave a message with their status and ability to come in to the office.

When the local office phone system is not operational, staff should try other options, including:

- 1) Call your Unit Manager (home or cell)
- 2) Call your local office FAX line, if someone is in your office, they will know to answer this line as it will be the only functioning phone.
- 3) Call the NWSDS Salem Office
- 4) Call another NWSDS Unit Office
- 5) Call one of your co-workers

Communication with Partners

When the Plan is activated, the following entities may need either notification or regular updates as applicable. They also may need/be able to provide assistance.

- For all events that require the activation of the plan (closure or impact on an office, activities limited to only mission critical functions, or emergency planning for either consumers or the larger community of vulnerable Oregonians), the DHS central office will be notified when feasible and safe.
- State DHS and/or APD
 - Administrator for Licensing and Quality of Care
- Local Emergency Operations Center
- NWSDS Staff (Use your local emergency contact list)
- Contact info of nearest NWSDS office that could assist
- NWSDS Facilities – Carl Gomoll
- Information systems – Carl Gomoll

- Other local partners impacted and/or able to help with responses

REMEMBER: When any person believes that their life or someone near them is in danger, CALL 911.

Alternate Communication System

In any significant disaster, regular phone service may be impacted. Frequently cell phone systems are overwhelmed and towers may be damaged. If power is out, corded phones may still work. Out-of-state calls may work when in-state calls don't. It is likely that multiple methods may need to be tried and may work sporadically. It is recommended that all methods are tried and retried. If phones are unavailable, the following procedures will be used:

- **Cell phones.** You may find coverage on high ground or near an undamaged tower, as long as there is power to the tower.
- **Satellite phones.** Despite the promise, these may be difficult to use. However, some local public health departments and some CAF District Offices have them. Additionally, most local emergency operations centers will have them.
- **Email.** This has actually been found to be more reliable than phones. You would need power (some offices have backup generators) for the computers and connection to the internet (data lines). Several NWSDS Offices have laptop computers with wireless broadband capability for internet connectivity. These units will be viable as long as cell towers are still functioning.
- **Amateur radio (HAM operators).** This is probably the most reliable form of communication in a disaster. Offices may find that some of their staff or their family members may be capable of providing this service. Your local emergency manager will already have a group of operators identified and organized for this purpose. Bear in mind that

this form of communication can be complex, particularly when you are trying to get information to & from a specific individual.

- **Texting.** Texts have been found to go through even when cell phone calls have not.
- **Faxes.** Requires power and operational telephone lines, but worth trying.
NOTE: using the corded phone on your FAX machine usually works when the power is off and the office phone system goes down when power is lost.
- **Messenger.** For communication locally, such as with your emergency manager, you may need to resort to foot or in-person.
- **Voice Over Internet Protocol (VOIP).** Phone systems over the internet, may be available. A common one is Skype.com that is free if the call is to another computer, not phone.

Authority

Agency Incident Commander

An Agency Incident Commander will be named every time the plan is activated. The person named may vary depending upon the type of incident or the scope of the event. The Agency Incident Commander will be designated by the ranking member of the NWSDS Executive Management Team.

The duties overseen by the Agency Incident Commander include:

- Assessing and triaging the incident
- Naming a Response Team, when the situation warrants one
- Determining the response activities
- Assigning duties
- Documenting the response
- Authorizing and tracking expenditures
- Ensuring the safety of the Response Team
- Ensuring the accurate sharing of information with all parties

- Planning for the next phase of the response
- Planning for and authorizing the deactivation of the response
- Communication / Updates

Law Enforcement/ Emergency Management Contacts

Unit Managers at all NWSDS Branch Offices **EXCEPT SALEM** are the primary contacts for local law enforcement and emergency management individuals. LEA/EM contact for Salem will be designated by EMT. This person will triage the situation, gather any needed information, determine the appropriate agencies to be contacted, and keep the Agency Incident Commander informed of all contacts and decisions.

Media Notification

This needs to be determined locally, dependent upon local partners, agreements, severity of the event, etc. The following are examples that may or may not be appropriate for a given area.

A designated member of the NWSDS EMT will be the sole contact with the media. All requests from the media shall be referred to them. All information and press releases will be shared with the Agency Incident Commander. All contacts will be documented.

A listing of newspapers, radio, TV stations, (including addresses and phone numbers) will be maintained at NWSDS Salem by the EMT.

State APD Coordination

Anytime the plan is activated, APD will be notified when feasible and as it warrants. If assistance is likely to be needed from either the state APD or other local offices, the state should be contacted as soon as possible. NWSDS EMT should have a pocket card with night and weekend contact

information for key state managers. For updates or replacements, email spd.ep@state.or.us .

The designated NWSDS Incident Commander will be tasked to coordinate with the state APD office.

APD will then designate a single point of contact and will take responsibility to keep needed other state partners (including state field manager, other state organizations, other APD/DHS staff, as decided upon in the original call) informed to minimize the impact on the local office.

De-Activation of Plan and Learning

As soon as the event begins to stabilize, the person or team responsible for planning needs to start planning for de-activation and return to business as usual. This may involve a complete de-activation or a step-down approach. The Incident Commander has the authority to de-activate the plan. As part of the de-activation, there needs to be a de-activation communication plan that communicates with all partners with consideration of notification of the media.

As part of the de-activation, there should be a document produced that summarizes the response to include at least the following information:

- Description of the event
- Summary of the different actions taken in the response, including a timeline.
- An accounting of the resources expended, including an accounting of staff time.

After the event, there should quickly be a De-brief scheduled with all major players to create an after-action plan. The goal is to determine what worked well and what didn't with a listing of lessons learned. The Emergency Preparedness Plan should be revised to reflect these needed changes.

Office Affected

Alternate Sites

If an office is not usable, staff are to report to an alternate site as told on the recorded message on the office phone, or as notified by the Unit Manager. The alternate sites will be predetermined for each office and adjusted during an event based on details of the event and impacted areas.

Emergency Supplies

The following supplies maintained at NWSDS offices are checked and updated annually by an OS2 named by the Unit Manager.

- Flashlight
- First Aid Kit
- Safety Vests
- Battery operated radio
- Petty cash
- List of high risk consumers
- AFS Form 437-100
- Paper applications

Security of Assets

Building Security

In all instances, staff safety is most important. Never should staff be put in danger. If a building is unsafe, staff should not enter until an inspector, first responder or other official says it is safe to re-enter. The designated NWSDS Incident Commander (IC) will be notified of this situation. Many NWSDS exterior office doors are equipped with locks and/or electronic key pads to limit entry. In the event of loss of power and the office has no back-up generator, the electronic key pads will no longer

work. In this situation, entrance to the building will only be possible with the use of a key. All Unit and Assistant Unit Managers should have an exterior door key in their possession at all times. If the US/AUS is not available to open the office and the office is equipped with a “knock box”, fire department personnel will be able to open the box & use the key inside to open the building. For security purposes in this situation, it is recommended that only one door to the office (probably the main door) should remain unlocked and be monitored by staff.

If the building is physically damaged, but deemed safe for staff to enter by local inspectors, proceed with an on-site assessment of the damage. Pass the results of the assessment to the NWSDS Incident Commander and wait for further instructions.

Cars

Cars are to remain locked when not in use. Use of cars will be prioritized to assure fulfillment of the Mission Critical Functions with the Agency Incident Commander having final decision making authority. All cars should be monitored to keep fuel tanks at least ½ full.

Petty Cash/EBT Cards and Machines

Petty cash is kept in the safe in reception. OS2 staff and Managers know the codes.

One of the EBT machines is in the reception area. All staff must sign off when finished using the machine. The spare EBT machine is kept in the locked file cabinet near the receptionist’s desk. In the event that the office needs to be relocated, the EBT machine/s shall be taken to the alternate site.

The EBT cards are kept in the safe reception. They must be logged in and out of the safe.

Privacy of Protected Information and Security of Sensitive Information

Even in an emergency or event requiring relocation of the office, all reasonable steps should be taken to protect the security of consumer information and other important information, both paper-based and electronic.

Office Closure

Authority to Close

NWSDS will curtail services and close office facilities only under hazardous conditions or inclement weather that interfere with normal agency operations.

The decision to close any NWSDS office will be made by a member of the NWSDS Executive Management Team based on their availability. A list of EMT members and their contact information is listed earlier in this document.

Notification of Closure

The NWSDS Executive Management Team or at their direction, the designated NWSDS Incident Commander may deem it appropriate to provide office closure information to designated media outlets for dissemination to the public. A contact list for designated media outlets will be kept at the Salem Office for use by EMT/IC when needed.

In an emergency event, all staff will attempt to call their home office to determine if there is an office closure. There will be a recorded message with instructions for staff, as long as the office phone system is operational. If the office phone system is operational all staff should leave a message with their status and ability to come in to the office.

Expectations for Staff Reporting to Their Home Office

All staff are considered essential for business continuity and if safe, should attempt to report for duty unless otherwise notified either directly by NWSDS Management or by contacting the local office for a recorded message with alternate instructions. Staff should make their own decision regarding their safety and ability to travel to the office during an event keeping their personal safety as a priority.

Notification of Consumers

Phones: When safe and feasible, main messages will be changed to inform callers of conditions and office availability. Closed offices will forward phones to designated office when possible. Messages will be retrieved and calls returned according to priority of need. Instructions for forwarding the phone and remotely retrieving messages is available on the shared drive.
Notices: Notices will be posted on all entrances to the building and at all meal sites.

Continuity of Operations / Business Continuity

NWSDS must ensure critical business functions and public services continue or are restored as quickly as possible despite interruption by an emergency, disaster or other unplanned event, either natural or manmade. NWSDS serves many Oregonians in our designated service areas who are dependent upon our services for basic needs. We must be prepared to respond to an emergency of any level in order to ensure the safety, health and well-being of Oregonians receiving services, vulnerable residents, employees and volunteers.

As always, the first priority is the safety of staff, volunteers, and consumers in the office.

Mission Critical Services/ Functions

Every event is different. The following mission critical services may need to be prioritized based on the needs of the needs of the local population and the available resources. If the following services/functions cannot be performed within a reasonable time (usually 3 days) request additional resources from other NWSDS offices, local emergency management or the APD central office.

- Eligibility Determination – both Medicaid Financial and Service eligibility
- SNAP (food stamps) Eligibility Determination and Issuing Benefits
- D-SNAP (Disaster SNAP) Eligibility Determination and Issuing Benefits
- Authorization of Services and Placement
- Payment of Providers
- Protective Services and Complaint Investigations
- OPI eligibility and authorization of services
- Senior Nutritional Programs (Meals on Wheels delivered and congregate)

Alternative Work Strategies

The NWSDS Incident Commander or designee, in consultation with a member of NWSDS EMT, will determine the appropriate strategy and prioritize the use of resources to continue to provide services to individuals we serve during an event. For strategies that are outside current policies, contact the APD Field Services Manager for variance approval.

Recovery of Office Functions

As early as possible, the designated NWSDS Incident Commander will start planning to re-establish normal office functions.

- If the building has been evacuated, get an estimate of when the office could be re-occupied. Consider the establishment of an interim office location if the office will need significant repairs.

- If the building has been evacuated for safety concerns, contact local Emergency Management for an inspection, they will likely have set up an inspection team.

Community Specific Actions and Resources

Roles for Response to Community Impact

If the local NWSDS office participates in a Vulnerable Population Group as a part of local Emergency Management or is a designated participant at the Local Emergency Command Center, they will be one of the first notified in an emergency event. Any local NWSDS office notified by their local Emergency Command Center will immediately contact NWSDS Executive Management Team to request activation of the emergency response plan for the locally affected area.

The local NWSDS Office has responsibility to coordinate with and assist local emergency response teams to:

1. Protect the health and safety of staff
2. Protect the health and safety of consumers
3. As the local Area Agency on Aging and the agency responsible for providing protective services, protect the health and safety of seniors and people with disabilities who are not consumers, to the extent possible.

The Agency Incident Commander will either conduct the following or assign the following tasks:

- Assess the impact of the incident on various communities and neighborhoods.
- Establish communication with the local County Emergency Commander or other First Responders.
- Establish a list of needed actions
- Prioritize the actions
- Assign responsibilities for completion of the actions.

- Repeat above actions as the event evolves.

Important Actions could include:

- Providing Mission Critical functions (may need to include provisions for crowd control)
- Determining and distributing Disaster Supplemental Nutritional Assistance Program (DSNAP) benefits.
- Assisting with notification of the population about the event and recommended steps to take
- Contacting the population to determine status of consumers and population and doing a needs assessment
- Arranging for evacuation
- Arranging for Vulnerable Populations sheltering
- Asking for assistance from local, regional, or state resources
- Keeping needed entities apprised of status
- Documenting actions, expenditures, and time

Each event is unique and staff will be assigned based upon the needs of the event. However, it is anticipated that at local Unit Offices:

- Front office receptionist will staff the main lines, route calls to any available staff, and handle walk-in traffic.
- Eligibility workers will provide the Mission Critical Functions.
- Protective Service Workers and Case Managers will be assigned to contact and assist consumers and the population as assigned.
- Managers and others may be assigned roles in the Agency Incident Command Structure.

Coordination Activities with state and local authorities

Local Unit Managers will maintain ongoing relationships with local Emergency Managers, law enforcement, fire departments and emergency responders. NWSDS will participate in local response exercises and planning. These planning exercises should include broad discussions regarding the vulnerable populations we serve and discuss certain high risk

populations that would require specialized response(s) by NWSDS and emergency responders. When appropriate, Agency maintained lists of high risk consumers should be shared with emergency responders so appropriate triage can occur in the response activities.

In the event of an event triggering the activation of the NWSDS Emergency Response Plan, the local Unit Manager or Agency Incident Commander will connect with the local identified Emergency Operations Commander. At a minimum, the following will be discussed/communicated with the Emergency Operations Center (EOC):

- Current situations of Agency operations, including Agency resources available to help local recovery activities
- Shared list of high risk consumers and planned actions for follow-up and check-in
- Any facility issues necessitating assistance or help from the EOC
- Date/Time of next update

Regular updates and communication with the local EOC will be the responsibility of the onsite Unit Manager or designated Agency Incident Commander. Regular updates will also be provided to a member of EMT.

Appendix F - Designated Focal Points

NWSDS Service Offices:

- **Dallas:** 260 NE Kings Valley Highway, Dallas, OR 97338. Phone: 503-831-0581. Zip codes served: 97306, 97338, 97361, 97344, 97304, 97351, 97371.

- **McMinnville:** 300 SW Hill Road, McMinnville, OR 97128. Phone: 503-472-9441. Zip codes served: 97378, 97128, 97148, 97127, 97396, 97111, 97347, 97115, 97101, 97132, 97114.
- **Salem:** 3410 Cherry Avenue NE, Salem, OR 97303. Phone: 503-304-3400. Zip codes served: 97342, 97325, 97392, 97384, 7383, 97358, 97350, 97346, 97317, 97305, 97302, 97301, 97303, 97352, 97360.
- **Tillamook:** 5010 E Third Street, Tillamook, OR 97141. Phone: 503-842-2770. Zip Codes served: 97131, 97108, 97112, 97147, 97134, 97118, 97141, 97107, 97122, 97149, 97135, 97136, 97130.
- **Warrenton:** 2002 SE Chokeberry Avenue, Warrenton, OR 97146. Phone: 503-861-4200. Zip Codes served: 97103, 97138, 97102, 97110, 97145, 97121, 97146.
- **Woodburn:** 2100 Progress Way, Woodburn, OR 97071. Phone: 503-981-5138. Zip Codes served: 97381, 97385, 97002, 97020, 97026, 97032, 97071, 97362, 97375, 97137.

Senior Centers

- **City of Salem, Center 50+:** 2615 Portland Road, Salem
- **McMinnville Senior Center:** 2250 NE McDaniel Lane, McMinnville
- **Monmouth Senior Center:** 180 Warren Street S. Monmouth
- **Mt. Angel Community Center:** 195 Charles Street, Mt. Angel
- **Chehalem Community Center:** 101 W. Foothills Drive, Newberg
- **Silverton Senior Center:** 115 Westfield Street, Silverton
- **Bob Chisholm Community Center:** 1125 Avenue A, Seaside
- **Kiawanda Community Center:** 34600 Cape Kiawanda Drive, Pacific City

Appendix G – OPI Policies and Procedures

OPI PROGRAM SCOPE

Scope of the Program

The OPI program is designed to assist consumers in remaining in their own homes. Often, OPI funded services **augment** other support systems the consumer may have available. Due to limitations of OPI funding, it should not be expected that the services offered can meet the total care needs of extremely functionally dependent consumers.

- **OPI does NOT transfer between AAAs.** If a consumer transfers from another area outside NWSDS, their services will be closed. If they wish to continue to receive OPI benefits, they will be considered as a new request and will require an intake and be placed on the waitlist.

Service Priority Levels

Case Managers may authorize OPI funded services to consumers that demonstrate a need for assistance and score at Service Priority Level 17 or below on the SPD CAPS assessment tool.

Service Amounts

NWSDS has established general **guidelines** to assist staff in determining the number of hours that may be indicated for specific in-home tasks, with a **maximum** of 18 hours every 28 day for housekeeping or personal care alone, or a combination of both. . These should be used as a guideline. If circumstances indicate differing needs the case needs to be reviewed with a Program Manager.

Mixed Households

If a consumer resides in a household composed of non-OPI eligible individuals, the OPI services need to be directed only to the OPI eligible member of the household. For example, laundry and shopping should be targeted toward the OPI consumer, and not for the benefit of other members of the household.

Meal Preparation & Home Delivered Meals

NWSDS uses OPI funding to reimburse for agency provided Home Delivered Meals (HDMs). In addition, OPI funding is used to reimburse for

HDMs provided under contractual agreements with Marion Polk Food Share for Marion and Polk counties and Warrenton Senior Citizens, Inc. for Clatsop County. In order to receive OPI funded HDMs the consumer must be receiving another OPI service. An OPI consumer cannot receive a HDM and meal preparation assistance for the same meal.

Home Care Workers (HCW)

OPI funded in-home services are provided via an In-Home Agency contractor or a Home Care Worker. The choice of using the contractor or home-care worker will vary depending upon consumer choice/need, availability of workers in your geographic area and funding limitations.

If OPI consumer has not billed services for 3 consecutive months, the CM will follow up with consumer to see why they are not receiving services. If the issue is failure to hire a HCW with no extenuating circumstances, the Case Manager will follow closure procedure. (OAR 411 divisions 30 & 31)

Registered Nursing Services

NWSDS currently does not use OPI funding to reimburse for RN services.

Adult Day Care

Adult day care for OPI consumers is available through a contract with an adult day care center. While some foster homes are specifically licensed to provide adult day care in addition to their live-in residents, a separate contract would need to be drawn up and signed before adult day care service could be provided to OPI consumers through a foster home.

Prior Resources

Applicants will be screened to determine whether their needs can be met through other resources. Every effort will be made to assist applicants in utilizing other resources before bringing them into the OPI program. However, consumers will not be denied access to the program for failure to exercise other options.

Fees

There is a minimum \$25.00 one-time fee for OPI consumers whose income does not require a cost share on the sliding fee schedule. Consumers will be encouraged to contribute to the cost of service based on the sliding fee schedule outlined in OPI rule. Consumers will not be denied service for failure to remit fee payments.

Consumer Grievance Process

It is NWSDS's philosophy to ensure the public receives professional, compassionate and fair treatment. When consumers express dissatisfaction with services provided through OPI, they will be provided with the Agency's **Right to Grievance** Form.

Guidelines for Assigning Hours for OPI Consumers

In order to provide maximum use of limited resources, promote program consistency, and assist NWSDS staff, the following guidelines have been established for the authorizing of OPI hours.

Case Managers may authorize up to 18 hours every 28 days. Plans exceeding these hours need Program Manager approval and generally intended to be for short-term plans (1-3 months).

<p>Housecleaning or other IADL/self-management tasks to include : Housekeeping - vacuuming, mopping, cleaning bathroom, Laundry (in home/or out of home), Meal prep, Medication Management, (CIHA min & substantial) * Shopping, Transportation ** non-medical/assisted transportation, all other <i>self-management tasks</i>.</p>	<p>Alone or a combination of ADL and IADLs, not to exceed 9 hours of service every 14 days (18 hours every 28 days)</p>
<p>Personal care services/ADL tasks to include: Bathing/dressing, Personal Hygiene/grooming Ambulation/transferring, Eating Medication Management (CIHA full assist) * and all other <i>daily living tasks</i>.</p>	<p>Alone or a combination of ADL and IADLs, not to exceed 9 hours of service every 14 days (18 hours every 28 days)</p>
<p>Adult day care services: (in Salem area contracted service is Among Friends at Center 50+)</p>	<p>1 day per week. If more days may be needed, see Program Manager for approval.</p>

Home Delivered Meals (HDM):	May be authorized if not otherwise provided & are paid through OPI.
Assistive Technology: installation of Emergency Response System (i.e. LifeLine). Payment for electronic or non-electronic medication reminder device; durable medical equipment. Durable Medical Equipment	Manager approval ***
Assisted Transportation: OPI Pilot consumers only	Manager approval***

*Medication Management, if full assist for medication due to set-up and provider is the contract in-home agency, service plan hours need to be in ADL or personal care section for full assist higher rate of pay for provider. Add hours to another ADL and note the medication management additional hours in the comments on the 546 N.

**Mileage reimbursement can be authorized for shopping and non-medical transportation at a reasonable amount on the 546 N for HCW, contract in-home agency does not transport.

*** Manager can approve locally and forward billing to Fiscal.

Chore Services include but are not limited to:

A. Washing floors, windows and walls, tacking down loose rugs and tiles for safe access and egress.

B. Mowing and trimming lawn using either a hand mower or power mower; cleaning grounds using rake, broom and/or hose; trimming shrubs and trees.

C. Keeping sidewalks clear of vegetation by removing, trimming, cutting or otherwise rectifying trees, bushes and shrubs which overhang sidewalk, right-of-way or meter pit, creating a hazard, obstruction or sight problem.

Appendix H – Partner Memorandum of Understanding

[Intentionally Left Blank, not applicable to NWSDS]

Appendix I – Statement of Assurances and Verification of Intent

For the period of January 1, 2017 through December 31, 2020, NorthWest Senior and Disability Services (NWSDS) accepts the responsibility to

administer this Area Plan in accordance with all requirements of the Older Americans Act (OAA) (P.L. 109-365) and related state law and policy.

Through the Area Plan, NWSDS shall promote the development of a comprehensive and coordinated system of services to meet the needs of older individuals and individuals with disabilities and serve as the advocacy and focal point for these groups in the Planning and Service Area. NWSDS assures that it will:

- Comply with all applicable state and federal laws, regulations, policies and contract requirements relating to activities carried out under the Area Plan.
- Conduct outreach, provide services in a comprehensive and coordinated system, and establish goals objectives with emphasis on:
a) older individuals who have the greatest social and economic need, with particular attention to low income minority individuals and older individuals residing in rural areas; b) older individuals with significant disabilities; c) older Native Americans; and d) older individuals with limited English proficiency..
- All agreements with providers of OAA services shall require the provider to specify how it intends to satisfy the service needs of low-income minority individuals and older individuals residing in rural areas and meet specific objectives established by NWSDS for providing services to low income minority individuals and older individuals residing in rural areas within the Planning and Service Area.
- Provide assurances that the area agency on aging will coordinate planning, identification, assessment of needs, and provision of services for older individuals with disabilities, with particular attention

to individuals with significant disabilities, with agencies that develop or provide services for individuals with disabilities.

- Provide information and assurances concerning services to older individuals who are Native Americans, including:
 - Information concerning whether there is a significant population of older Native Americans in the planning and service area, and if so, an assurance that the Area Agency on Aging will pursue activities, including outreach, to increase access of those older Native Americans to programs and benefits provided under the Area Plan;
 - An assurance that the area agency on aging will, to the maximum extent practicable, coordinate the services the agency provides with services provided under Title VI of the Older Americans Act; and
 - An assurance that the area agency on aging will make services under the Area Plan available, to the same extent as such services are available to older individuals within the planning and service area, to older Native Americans.

Obtain input from the public and approval from the AAA Advisory Council on the development, implementation and administration of the Area Plan through a public process, which should include, at a minimum, a public hearing prior to submission of the Area Plan to DHS. NWSDS shall publicize the hearing(s) through legal notice, mailings, advertisements in newspapers, and other methods determined by the AAA to be most effective in informing the public, service providers, advocacy groups, etc.

Date

Executive Director

Date

Senior Advisory Council Chair

Date

Disability Advisory Council Chair

Date

Legal Contractor Authority
Chair – Board of Directors

Appendix J - SERVICE MATRIX and DELIVERY METHOD

<input checked="" type="checkbox"/> #1 Personal Care (by agency) Funding Source: <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI <input checked="" type="checkbox"/> Other Cash Funds <input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Self-provided Contractor name and address (List all if multiple contractors): <ul style="list-style-type: none">• Addus Healthcare, Inc. 3400 Warrenville Road, Ste 100, Downers Grove, IL 60515-1765; For Profit• Caring for the Coast, 1230 Marine Drive, Ste 308, Astoria, OR 97103; For Profit Note if contractor is a "for profit agency"
<input checked="" type="checkbox"/> #1a Personal Care (by HCW) Funding Source: <input type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI <input type="checkbox"/> Other Cash Funds
<input checked="" type="checkbox"/> #2 Homemaker (by agency) Funding Source: <input checked="" type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI <input checked="" type="checkbox"/> Other Cash Funds <input checked="" type="checkbox"/> Contracted <input type="checkbox"/> Self-provided Contractor name and address (List all if multiple contractors): <ul style="list-style-type: none">• Addus Healthcare, Inc. 3400 Warrenville Road, Ste 100, Downers Grove, IL 60515-1765; For Profit• Caring for the Coast, 1230 Marine Drive, Ste 308, Astoria, OR 97103; For Profit Note if contractor is a "for profit agency"
<input checked="" type="checkbox"/> #2a Homemaker (by HCW) Funding Source: <input type="checkbox"/> OAA <input checked="" type="checkbox"/> OPI <input type="checkbox"/> Other Cash Funds

#3 Chore (by agency)

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Addus Healthcare, Inc. 3400 Warrenville Road, Ste 100, Downers Grove, IL 60515-1765; For Profit
- Caring for the Coast, 1230 Marine Drive, Ste 308, Astoria, OR 97103; For Profit
- Various community vendors on an as-needed basis utilizing quotes

Note if contractor is a "for profit agency"

#3a Chore (by HCW)

Funding Source: OAA OPI

Other

#4 Home-Delivered Meal

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Bateman Senior Living, 2400 Yorkmont Road, Charlotte, NC 28217; For Profit
- Marion Polk Food Share, 1660 Salem Industrial Drive NE, Salem, OR 97301, Not-for-Profit
- Chehalem Park and Recreation District, 125 S. Elliot Street, Newberg, OR 97132, Local Govt.
- Sunset Empire Park and Recreation District, 1140 Broadway, P.O. Box 514, Seaside, OR 97318. Local Govt.
- Warrenton Senior Citizens, P.O. Box 192, Warrenton, OR 97146; Not-for-Profit.
- Providence Hospital-Seaside; Not-for-Profit.

Note if contractor is a "for profit agency"

#5 Adult Day Care/Adult Day Health

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- City of Salem, Center 50+, 2615 Portland Road, Salem, OR 97301; Local Govt.

Note if contractor is a "for profit agency"

#6 Case Management

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#7 Congregate Meal

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Bateman Senior Living, 2400 Yorkmont Road, Charlotte, NC 28217; For Profit
- Marion Polk Food Share, 1660 Salem Industrial Drive NE, Salem, OR 97301, Not-for-Profit
- Chehalem Park and Recreation District, 125 S. Elliot Street, Newberg, OR 97132, Local Govt.
- Sunset Empire Parks and Recreation-Seaside

Note if contractor is a "for profit agency"

#8 Nutrition Counseling

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#9 Assisted Transportation

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Medix Ambulance Service, 2325 SE Dolphin Road, Warrenton, OR, For Profit

Note if contractor is a "for profit agency"

#10 Transportation

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#11 Legal Assistance

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Legal Aid Services of Oregon, 105 High St. NE, Salem, OR 97301; Not-for-Profit
- Oregon Law Center, 230 NE Second Avenue, Ste F, Hillsboro, OR 97124; Not-for-Profit

Note if contractor is a "for profit agency"

#12 Nutrition Education

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Marion Polk Food Share, 1660 Salem Industrial Drive NE, Salem, OR 97301, Not-for-Profit
- Chehalem Park and Recreation District, 125 S. Elliot Street, Newberg, OR 97132, Local Govt.
- Sunset Empire Parks and Recreation-Seaside

Note if contractor is a "for profit agency"

#13 Information & Assistance

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#14 Outreach

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#15/15a Information for Caregivers

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- City of Salem, Center 50+, 2615 Portland Road, Salem, OR 97301; Local Govt.

Note if contractor is a "for profit agency"

#16/16a Caregiver Access Assistance

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- City of Salem, Center 50+, 2615 Portland Road, Salem, OR 97301; Local Govt.

Note if contractor is a "for profit agency"

#20-2 Advocacy

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#20-3 Program Coordination & Development

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#30-1 Home Repair/Modification

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#30-4 Respite Care (IIB/OPI)

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#30-5/30-5a Caregiver Respite

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Addus Healthcare, Inc. 3400 Warrenville Road, Ste 100, Downers Grove, IL 60515-1765; For Profit.
- City of Salem, Center 50+, 2615 Portland Road, Salem, OR 97301; Local Govt.
- Enrolled consumers engage the service and are reimbursed by NWSDS.

Note if contractor is a "for profit agency"

#30-6/30-6a Caregiver Support Groups

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#30-7/30-7a Caregiver Supplemental Services

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Enrolled consumers engage the service and are reimbursed by NWSDS

Note if contractor is a "for profit agency"

#40-2 Physical Activity and Falls Prevention

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Rachel Bailey (Tai Chi)
- City of Salem, Center 50+ (Otago)
- John Price (Tai Chi) –retiring end of 2019
- Sunset Empire Park & Recreation Dist. (Arthritis Aquatics, Tai Chi, Otago)
- Tillamook YMCA (Tai Chi, Enhanced Fitness Otago)
- NorthWest Rehabilitation Associates (Otago)
- Columbia Memorial Hospital (Tai Chi, A Matter of Balance)
- Roberta Lippert (TaiChi)
- Holly Rudman (Otago – employee)
- Elaine Lozier (Otago – employee)
- Lavinia Goto (Otago, Taichi - employee)
- Michelle Rogers (Otago)
- Jill Mulligan (Otago)
- Tracy Johnston (Taichi)

Note if contractor is a "for profit agency"

#40-3 Preventive Screening, Counseling and Referral

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#40-4 Mental Health Screening and Referral

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#40-5 Health & Medical Equipment

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Assured Independence For Profit Agency

Note if contractor is a "for profit agency"

#40-8 Registered Nurse Services

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#40-9 Medication Management

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

HomeMeds/ Partners in Care Foundation

Kate Fredricks (Pharmacist), for profit

Note if contractor is a "for profit agency"

#50-1 Guardianship/Conservatorship

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#50-3 Elder Abuse Awareness and Prevention

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Legal Aid Services of Oregon, 105 High St. NE, Salem, OR 97301; Not-for-Profit
- Oregon Law Center, 230 NE Second Avenue, Ste F, Hillsboro, OR 97124; Not-for-Profit

Note if contractor is a "for profit agency"

#50-4 Crime Prevention/Home Safety

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#50-5 Long Term Care Ombudsman

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#60-1 Recreation

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#60-3 Reassurance

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#60-4 Volunteer Recruitment

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#60-5 Interpreting/Translation

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Professional Interpreters, 4049 Market St. NE, Salem OR, For Profit Agency
- IRCO, 10301 NE Glisan St. Portland, OR 97220, Not for Profit
- CTS Language Link, 911 Main Street #10, Vancouver, WA 98660. For Profit Agency
- Voiance (Cyracom), 5780 N Swan Rd, Tucson, AZ 85718, For Profit Agency

Note if contractor is a "for profit agency"

#70-2 Options Counseling

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Contract ended in 2018: Lane Independent Living Alliance (LILA)

Note if contractor is a "for profit agency"

#70-2a/70-2b Caregiver Counseling

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Enrolled consumers engage the service and are reimbursed by NWSDS

Note if contractor is a "for profit agency"

#70-5 Newsletter

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#70-8 Fee-based Case Management

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#70-9/70-9a Caregiver Training

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- City of Salem, Center 50+, 2615 Portland Road, Salem, OR 97301; Local Govt
- Contract ended in 2018: Joyce Beedle, 6929 SE 108th Ave, Portland, OR 97266

Note if contractor is a "for profit agency"

#70-10 Public Outreach/Education

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#71 Chronic Disease Prevention, Management/Education

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

- Rachel Bailey (Living Well, NDPP, etc)
- Columbia Memorial Hospital (Living Well, , Strong Women)
- Roberta Lippert (NDPP, Living Well)
- John Price (Living Well, Taichi, NDPP) – retiring end of 2019
- Tillamook Regional Medical Center (NDPP) – MOU, in-kind
- Rinehart Clinic (Living Well) – MOU, in-kind
- Virginia Garcia Health Clinic (Living Well/Tomando Control) – MOU, in-kind
- Susan Merrill (Living Well)
- Elaine Lozier (Living Well, NDPP – employee)
- Lavinia Goto (Living Well, NDPP – employee)
- Judi Sunquist (Living Well, NDPP, Registered Dietician)
- Holly Rudman (NDPP – employee)
- Lori Beyer (NDPP – intern)
- McMinnville Internal Medicine (Living Well) – MOU, in-kind
- Roberto Camarillo (Living Well, NDPP, DEEP)
- Sandra Eschavarria (Living Well, DEEP)
- Wimahl Family Clinic (NDPP)-for profit agency
- Michelle Rogers (NDPP)

Note if contractor is a "for profit agency"

#72 Cash and Counseling

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#73/73a Caregiver Cash and Counseling

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#80-1 Senior Center Assistance

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#80-4 Financial Assistance

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#80-5 Money Management

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Note if contractor is a "for profit agency"

#90-1 Volunteer Services

Funding Source: OAA OPI Other Cash Funds

Contracted Self-provided

Contractor name and address (List all if multiple contractors):

Faith in Action, 310 Villa Road, Ste 110, Newberg, OR 97132

Note if contractor is a "for profit agency"